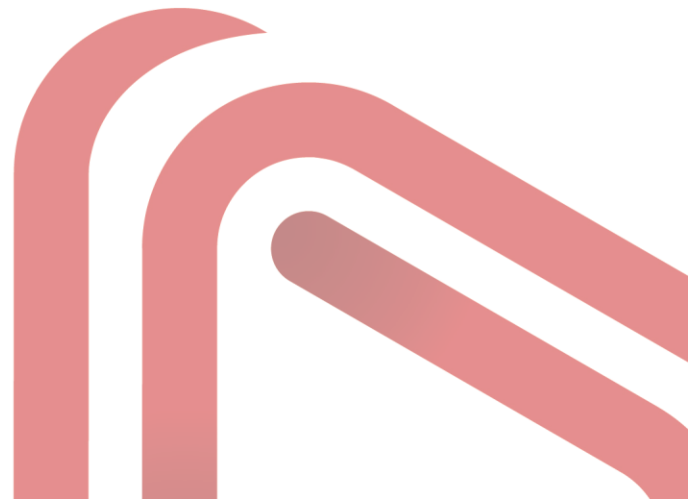




CONVERGENCE
TRAINING

Customer Portal

User Guide



Contents

- Introduction**..... 2
- Website**..... 2
- How to Register** 2
- How to Login**..... 3
- Main/Landing Page** 3
- My Profile/Change Password** 4
 - Update Profile 4
 - Change Password 4
- Support** 5
 - Open/Closed Support Tickets 5
 - View Open Support Tickets..... 5
 - Open a New Support Ticket 6
 - Request an Update for an Active Support Ticket..... 7
 - Request an Update for an Active Support Ticket..... 7
- Knowledgebase** 8
 - Access the Knowledgebase 8
- File Sharing** 9
 - Create a New Folder and Upload a File 9
 - Upload a File 9
 - Download a File..... 10
 - Delete a File 10
- Media Projects**..... 10

Introduction

The Support Portal is an online resource that allows access to the following:

- **Support Tickets:** View and open and closed support tickets submitted by you or others in your organization
- **Knowledgebase:** View the online help system
- **File Sharing:** Upload or download large files to or from our support them in a secure environment that may be required to support your product
- **Contact Us:** Displays our support and sales contact information (email and phone)

Website

To access the customer portal, navigate to the following URL: <https://portal.convergencetraining.com/>

It is highly recommended that you upgrade to an HTML 5 browser for best results using this site such as:

- Chrome – all versions
- Firefox – all versions
- Internet Explorer 10 and above
 - Internet Explorer 8 and 9 is not an HTML 5 browser and will limit the file size that can be uploaded using File Sharing
- Opera 12.0 and above
- Safari 6.0 and above

How to Register

Follow these steps to register for the Customer Support Portal:

1. Launch the web browser
2. Navigate to the following URL: <https://portal.convergencetraining.com/>
3. Click the **Request Access** button
4. Complete all the data fields on the Request Access screen
5. Click the **Submit** button
6. You will receive an email from our support department within 24 hours that includes a link to the site, your username, and password

Note: Please check your junk mail folder before contact support if you haven't received your email notification within a reasonable period of time

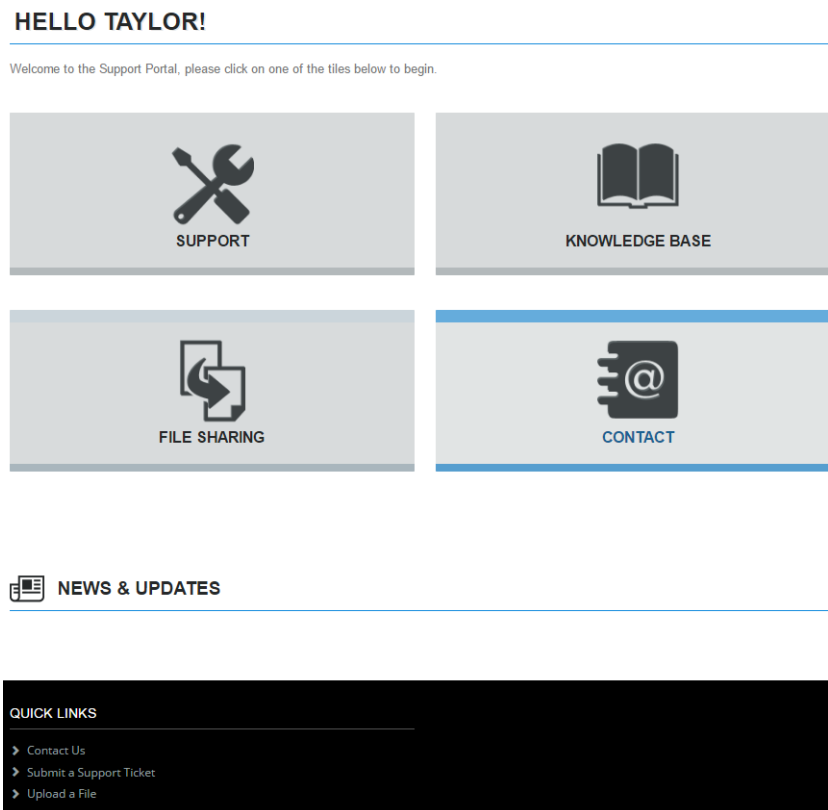
How to Login

Follow these steps to login to the Customer Support Portal after receiving the confirmation email from support:

1. Launch the web browser
2. Navigate to the following URL: <https://portal.convergencetraining.com/>
3. Enter your username
4. Enter your password
5. Click the **Login** button

Main/Landing Page

The main page or landing page is the first thing a user will see when they log into the portal and it presents the user with all of the options available in the portal



Category Tiles: There are tiles for each section of the portal that will allow the user to quickly jump to specific areas of the portal (up to six tiles can be shown based on the user's security roles)

News & Announcements: This section will show the user the 5 most recent news items/announcements

Site Footer: Provides the user with shortcuts to get to commonly used pages

My Profile/Change Password

Update your profile information (name, telephone, job title, address) as well as change your password

Update Profile

Follow these steps to update your profile:

1. Click the **My Profile** button
2. Update any of the provided fields
3. Click the **Update Profile** button to save the profile changes

Change Password

1. Click the **My Profile** button
2. Click the **Change Password** button
3. Type your current password
4. Type the new password
5. Type the new password again to confirm
6. Click the **Save Changes** button
7. Password Saved Successfully Confirmation will appear
8. Click on any button to move to another section of the portal

Support

The support section of the portal allows you to view active and closed support tickets, resolve an active support tick or request an update on an existing support ticket.

Open/Closed Support Tickets

The open or closed support ticket pages display a table of support tickets and relevant information

Ticket Number	Subject	Status	Account	Owner	Created On	Requested By
<input type="checkbox"/> CAS-24472-D6F8Y3	Azure Backups	In Progress	Convergence Training LLC	Taylor Douthitt	1/16/2017	Taylor Douthitt
<input type="checkbox"/> CAS-24502-F4P0Y6	Code Signing Certificate	Assigned	Convergence Training LLC	Taylor Douthitt	1/17/2017	Taylor Douthitt

View Open Support Tickets

Follow these steps to view an open support ticket:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Click the down arrow on the **Filter Support Tickets** button and complete the following fields
 - a. Display Tickets Requested by: Make a selection from the available choices from the drop down list or search by a specific word or term
 - b. Keyword or Ticket #: Type a word or the ticket number
 - c. Select Contract(s): Make a selection from the available choices from the drop down list or search by a specific word or term
 - d. Pick a Date: Make a selection from the available choices from the drop down list or search by a specific word or term
6. Click the **Update Results** button

Notes: Results that match your search criteria will be displayed in the table below.

View Closed Support Tickets

Follow these steps to view a closed support ticket:

Note: You will be able to view tickets related to outstanding issues and questions which require resolution or active requests for change if the change has been designated for a future release.

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Select **Closed Support Tickets**
6. Click the down arrow on the **Filter Support Tickets** button and complete the following fields
 - a. Display Tickets Requested by: Make a selection from the available choices from the drop down list or search by a specific word or term
 - b. Keyword or Ticket #: Type a word or the ticket number
 - c. Select Contract(s): Make a selection from the available choices from the drop down list or search by a specific word or term
 - d. Pick a Date: Make a selection from the available choices from the drop down list or search by a specific word or term
7. Click the **Update Results** button

Notes: Results that match your search criteria will be displayed in the table below.

Open a New Support Ticket

Follow these steps to open a new support ticket:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Click the down arrow to the right of the **Support** button located on the menu bar at the top of the screen
6. Select **Submit Support Ticket**
7. Complete all the fields in the Required Section of the Submit a Support Ticket Form
8. Complete any desired fields in the Options Section of the Submit a Support Ticket Form

Notes: (1) You may upload any files that may be of help in resolving the support request. (2) Refer to the File Sharing article below to learn how to upload files that are in excess of 50MB.

9. Click the **Create Support Ticket** button

Note: You will receive a confirmation that the support ticket was successfully submitted. Links will be provided to perform the following actions: (1) View list of open Support Tickets. (2) Upload/Download Files (3) Submit Another Support Ticket.

Request an Update for an Active Support Ticket

Follow these steps to open a new support ticket:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Follow the steps to “View Open Support Tickets” above to locate the desired ticket
6. Click the checkbox to the left of the desired ticket number
7. Select the **Request Update** button
8. Modify the Email Body of the Status Update Request if desired
9. Click the **Submit Request** button

Note: (1) You will receive a confirmation that the status update request was successfully submitted with instructions to contact support if the request is urgent. (2) Support will send an email and provide a case number or follow-up with a phone call to update you on the status of the support request.

10. Click the **Close** button

Request an Update for an Active Support Ticket

Follow these steps to open a new support ticket:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **Support** button
5. Follow the steps to “View Open Support Tickets” above to locate the ticket to be resolved
6. Click the checkbox to the left of the desired ticket number to be resolved
7. Select the **Resolve** button
8. Modify the Email Body of the Mark Support Ticket as Resolved if desired
9. Click the **Mark as Resolved** button
10. Click the **Close** button

Knowledgebase

The knowledge base section displays articles about Capstone products and services including tutorials/walkthroughs, images, and videos.

Note: *If you are a Convergence Training client with access to the original Knowledgebase, you will be asked to register for the Support Portal and be provided with new credentials*

The Knowledgebase is broken down into the following hierarchy:

- Categories
 - Articles
 - Article
- Search & Breadcrumbs – the top of the Knowledgebase section has a search box and a breadcrumb control to show the user their current location in the knowledge base and allows easier navigation to previously visited sections

Access the Knowledgebase

Follow these steps to access the Knowledgebase:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **Knowledgebase** button
5. Click the desired subject
6. Click the desired articles

File Sharing

The file sharing section allows users the ability to download/upload files to a company account using our custom built file browser safely and securely. You should only upload and download files when directed to by a support representative.

Notes: (1) Convergence Training uses Azure Storage as their file sharing site. (2) Convergence Training reserves the right to delete files on a regular basis. (3) Users will be able to see files stored to their company account only.

Create a New Folder and Upload a File

Follow these steps to create a new folder and upload a file (*at this time you are required to upload a file in order to create a new folder*):

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Click the **New Folder** button
6. Type the new folder name
7. Click the **Choose Files** button
8. Navigate to the network or local drive where the file you wish to upload is located
9. Select the file and click the **Open** button
10. Click the **Upload** button
11. Click the **Upload Another File** button to upload any additional file(s). Repeat this step until all desired files are uploaded.
12. Click the **Finished** button if all files have been uploaded

Upload a File

Follow these steps to upload a file:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Click the **Choose Files** button
6. Navigate to the network or local drive where the file you wish to upload is located
7. Select the file and click the **Open** button
8. Click the **Upload** button
9. Click the **Upload Another File** button to upload any additional file(s). Repeat this step until all desired files are uploaded.
10. Click the **Finished** button if all files have been uploaded

Download a File

Follow these steps to download a file:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Select the folder where the file is stored
Note: The Support Department will direct you to the appropriate folder
6. Click the checkbox to the left of the file to be downloaded
Note: Only one file can be downloaded at a time
7. Click the **Download** button
Note: A pop-up screen will appear which allows you to Open, Save or Cancel
8. Click the down arrow to the right of the **Save** button and select **Save As** selection
9. Navigate to the network or local drive where you wish to store the file
10. Click the **Save** button
11. Click the **Close** button
12. Repeat Steps 4-11 to download all remaining files

Delete a File

Follow these steps to PERMANENTLY delete an uploaded file:

1. Launch Internet Explorer or some other web browser
2. Type <https://portal.convergencetraining.com/>
3. Login to the support portal using your user name and password
4. Click the **File Sharing** button
5. Select the folder where the file is stored
6. Click the checkbox to the left of the file to be downloaded
7. Click the **Delete** button
8. Click the **OK** button
9. The file will be permanently deleted

Media Projects

The media projects section of the customer portal will show a table of the milestones for current custom media projects being worked on for a specific customer's user account