

# Smart Community

## User Guide

*Hexagon Asset Lifecycle Intelligence Division's  
Customer User Guide for Using **Smart Community***

[Frequently Asked Questions](#)

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Revised:	27 February 2025 <a href="#">Revision History</a>
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## Welcome to Smart Community

Welcome, **Smart Community** user!

Solution Support recently underwent a digital transformation. A large part of that effort was the modernization of our self-help site. The site's key features are described briefly in [Navigating Smart Community](#) and in more detail in their respective sections of this user guide.

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### Smart Community

The below features reside on the self-support site:

- Announcements
- Cases
- Chatter
- Dashboard
- Documentation
- Downloads
- Knowledge
- Product Compatibility Matrix
- Product Releases Schedule
- Subscriptions
- Support Forums

## Accessing Smart Community

### Supported Browsers

**Smart Community** is supported in the latest release of the following browsers:

- [Google Chrome](#)
- [Mozilla Firefox](#)
- [Microsoft Edge](#)
- [Apple Safari](#)

Other HTML5 browsers tend to work well with **Smart Community**, but they are unsupported.

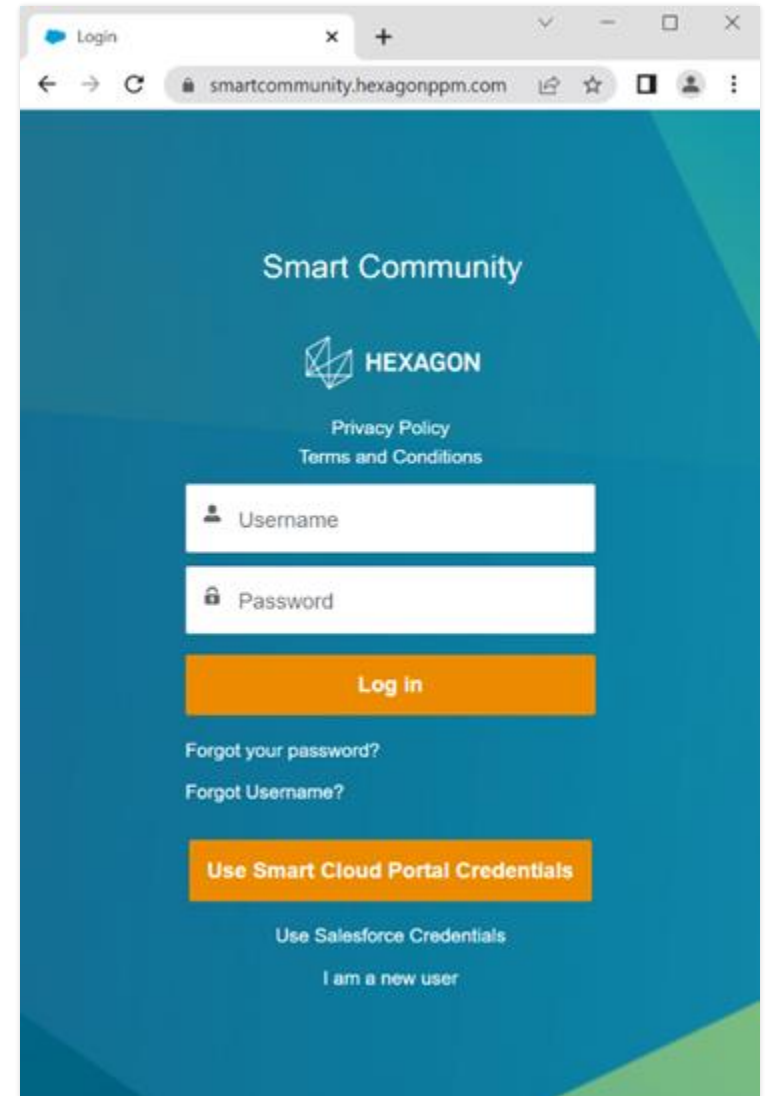
### URL

<https://SmartCommunity.HexagonPPM.com>

### Login Credentials

**Intergraph Smart Cloud** users, with proper permission granted, can access **Smart Community** via the Support icon (🔧) in the Cloud Portal. If a current Smart Cloud Portal session does not exist, click **Use Smart Cloud Portal Credentials**.

**On-Premise** (non-Cloud) users log in with your assigned **Smart Community** username and password. Your password is generated by the system and sent to you by email for your first login or anytime your password is reset.



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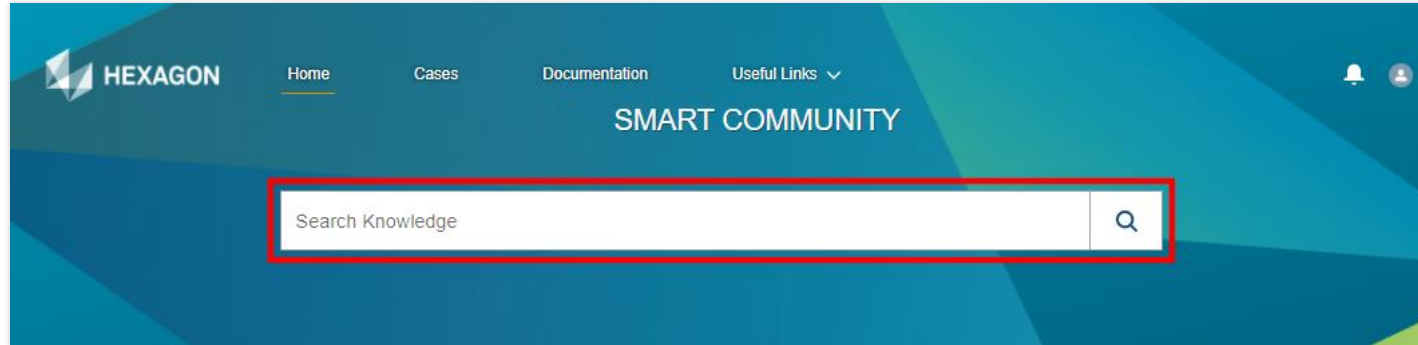
## Navigating Smart Community

After logging in to **Smart Community**, the **Home** page offers quick access to key functions of the Community. Primary functions of Smart Community are briefly described below:

- **Home** — Default landing page after logging in
- [Cases](#) — View existing support cases
- **Documentation** — Go to the Documentation site
- [Useful Links](#) — Find additional support-related information
- [Support Forums](#) — Post questions, engage in conversation with, and get help from other customers of Hexagon
- [Ideas](#) — Go to the Ideas Portal to view Ideas submitted to Product Development
- [Notifications](#) — Review Chatter communication
- [User menu](#) — Update contact information, profile; log out
- [Search Knowledge](#) — Search the support knowledge base
- [Dashboard](#) — Report-driven charts of your cases grouped by various attributes
- [Downloads](#) — Download service packs, hot fixes, utilities, technical notes, and whitepapers
- **Hexagon University** — Learn about Hexagon products in a self-paced eLearning platform
- [Subscriptions](#) — Receive notifications sent by Product Centers
- **Licensing** — Check current license usage
- [Profile](#) — Edit contact information
- [Announcements](#) — Brief announcements to keep users informed of upcoming site changes or planned downtimes
- [Create a Support Case](#) — Start the case creation flow and submit the case to the appropriate support center

## Search Knowledge

The **Search Knowledge** box near the top of the **Home** page will search across all Knowledge Articles. Users are encouraged to search through Knowledge Articles to see if the current issue/question has already been solved before creating a new case.



Enter a search phrase. An “exact search” can also be performed by enclosing a search phrase to be matched in double quotes. For example, searching for **Oracle 64-bit** may return nearly 100 matching results, whereas searching for **"Oracle 64-bit"** returns fewer results. Press **Enter** or click **Search (Q)** when ready to execute the search.

The image shows a search results page for the query 'oracle 64-bit'. At the top, there is a search bar with the query and a magnifying glass icon. Below the search bar, the results are displayed in a list. On the left side, there are filters for 'Product' and 'Record Type'. The 'Product' filter shows a list of products with checkboxes and counts: RIS (14), Smart 3D (13), Smart Instrumentation (22), Smart P&amp;ID (7), SmartPlant Foundation (6), PDS Project Admin (1), Smart Construction (1), and Smart Engineering Manager (5). The 'Record Type' filter shows 'Support (76)'. The main results area shows 'Results 1-10 of 76 for oracle 64-bit in 0.16 seconds'. The results are sorted by 'RELEVANCE' and 'DATE'. The first result is titled 'Configuration for Oracle 11g on 64-Bit Server' and is dated 'Last Thursday'. The second result is titled '64-bit Oracle Installation Fails After 32-bit Oracle Installation' and is dated '11/30/2020'. The third result is titled 'v2019 Upgrade Error About Oracle Client 64 Bit' and is dated '11/30/2020'. Each result has a 'Details' link and an eye icon.



Once the search results appear, filter on **Product** and **Record Type** as needed to narrow the search results. For Knowledge Articles, **Record Type** can be either **Support**, **How To**, or **FAQ**.

The screenshot shows a search interface with two filter panels on the left and search results on the right.

**Product Filter:** A list of products with checkboxes and counts: SmartPlant Foundation (6), Smart 3D (12), PDS Shell (2), RIS (14), Smart Electrical (1), Smart Engineering Manager (5), Smart Instrumentation (22), and Smart P&ID (6). A "+ Show more" link is at the bottom.

**Record Type Filter:** A list with "Support (6)" selected.

**Search Results:** The top bar shows "Product: SmartPlant Foundation x" and "Record Type: Support x". Below it, it says "Results 1-6 of 6 for oracle 64-bit in 0.36 seconds". The results are sorted by "RELEVANCE" and "DATE". Two results are shown, both labeled "KNOWLEDGE" and dated "11/30/2020".

**Result 1:** Title: "Oracle.DataAccess Error". Excerpt: "Oracle Data Access errors occur most of the time when there is an extra entry in the GAC ... .For example, if a user has the Oracle 32 and 64 bit clients installed, there will be one entry for ...".

**Result 2:** Title: "Oracle Client 12.2 Unable to Connect to Oracle". Excerpt: "After installation of Oracle Client 12.2, 64-bit, SPF site is unable to connect to ... to connect to database: Verify you have Oracle Client (64-bit) installed.&quot;SPF Server Manager&#39;s ...".

Results on a search of Knowledge Articles include the following information from the Articles:

- **Date** — the date the Article was last modified
- Article **title**
- An **excerpt** of the Article
- The related **Product**(s) — expand **Details** to see **Product**
- Article **Record Type** — **Support**, **How To**, or **FAQ** — collapsed under **Details**

The screenshot shows a Knowledge Article with the following details:

**KNOWLEDGE** (purple bar) 12/18/2020

**Implied Pipe Length for Reinforcing Pad not Generated** (green bar)

Even after configuring the Pipe Branch Fabrication Rule, the Implied pipe length for Reinforcing Pad is not generated in Smart3D. ... The Commodity Type must be one of the Reinforcing pad saddles o...

**Details**

Product: Smart 3D

Record Type: Support

Knowledge Articles are also [suggested throughout the support case creation flow](#).

## Cases

A case is a support request or ticket that belongs to one of three possible categories:

- **Service Request** — A report of a problem or question related to a Software Product in the customer environment. It can also refer to a request from a Cloud Application Administrator, Technical or Commercial contact, in each case, acting on behalf of Customer to ask for a service (e.g., backups, add additional Estate contacts) to be performed in the Customer Environment.
- **Cloud Incident** — Any unplanned interruption to Cloud Services, which results in a User being unable to access the Customer Environment or launch Software Products. This could be caused by a variety of factors including (but not limited to) network, hardware, software including applications, and service processes.
- **Estate Request** — It is a case opened to drive a change that needs to be implemented in a customer estate Viewing and Searching Existing Cases

From the **Home** page, click on **Cases** to go to a list view of existing cases.



Upon landing on the **Cases** tab, the default filters are applied to display all cases opened within the past month.

Cases

Export CSV

Search

From: Oct 4, 2021 To:

☐ My Cases Only

☐ Escalated to Management Only

☐ Active Only

☐ Closed Only

Reset

Case Number	Subject	Account	Site ID	Analyst	Contact	Status	Sub Status	Product	Priority	Created ...
00161956	networking error	Cloud Test 1	CLOUDTEST1	Laura E. Shero (L...	LauraAllCases S...	Owner Assigned		CAESAR II	2 - High	Nov 2, 2021
00161916	Testing- Training ...	TEST Customer ...	US00107701	Awaiting Assign...	John Demo	Open		SMART Build	4 - Low	Oct 4, 2021

First Prev 1 / 1 Next Last

Create a Support Case

The default **Cases** list view shows all cases that you have permission to view. The list can be filtered based a combination of fields:

- **Search** — Enter a known case number or a search string to match text/values from various fields within a case.
- **From** and **To** — The From date defaults to one month back, and the To date is empty by default which acts as the current date. Adjust as needed to capture the range of cases desired based on case's **Created Date** (date the case was opened).
- **My Cases Only** — Select to see only the cases on which you are the case Contact.
- **Escalated to Management Only** — Select to see only cases that are Escalated to Management.
- **Active Cases Only** — Select to see only cases that are Open.
- **Closed Cases Only** — Select to see only cases that are Closed.

As search criteria are entered, the results will update live. From the list currently displayed, click on a case number to view the case details.

---

### Case List Export

To export the current results to a Comma-Separated Value (CSV) file, click **Export CSV**. Your browser will download a file and save it as [\*ExportedData\\_....csv\*](#). Open the file in Microsoft Excel or another application.

**Note:** Also see the [For Export — All Cases All Fields](#) report under [Dashboard](#).

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### Submitting a New Support Case


The case creation flow is designed to ask for the minimum information needed to create each case. The flow considers information entered earlier in the flow to determine what information to collect next. For example, the type of Account (Cloud Estate or non-Cloud Account) and the **Support Product** determine what information is collected on later pages.

While entering information into the case, some possible solutions are recommended from the knowledge base. The suggested Knowledge Articles can be previewed or viewed in full without disrupting the creation of the case. If none of the recommended solutions relate to your case, the flow can be continued.

Use the **Create a Support Case** button on the **Home** page or the **Cases** page to start creating a case. Answer the questions on each page and click **Next** to continue.

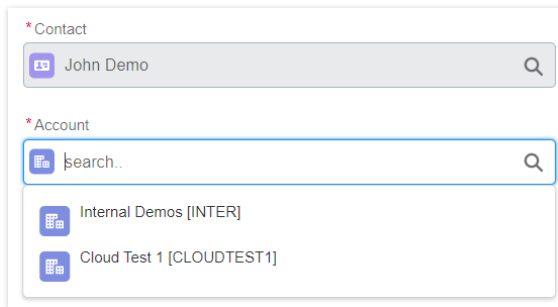
**Note:** The order and type of questions may be updated as needs change; however, the process generally remains the same.

**Contact** — Your name is automatically populated from your user profile. No input is required in this field.



A screenshot of a form with two fields. The first field, labeled '\* Contact', contains the text 'John Demo' and a search icon. The second field, labeled '\* Account', contains the text 'search..' and a search icon.

**Account** — Click in the field to see a list of Accounts associated to you. You can optionally type part of the Account name to narrow the list of choices. Select the Account that relates to this case.



A screenshot of the same form as above, but with the '\* Account' field selected. A dropdown list is visible below the field, showing two options: 'Internal Demos [INTER]' and 'Cloud Test 1 [CLOUDTEST1]'. The field itself contains the text 'search..' and a search icon.

**Support Product** — Click in the field to see a list of products that your Site currently has under a maintenance contract. If the product that relates to this case is not under maintenance, click **Search All Products**. You can optionally type part of the **Support Product** name to narrow the list of choices. Select the **Support Product** that relates to this case.

The screenshot shows a software interface with two main sections. The top section is labeled 'Account' and contains a search bar with the text 'Internal Demos [INTER]' and a magnifying glass icon. The bottom section is labeled 'Support Product' and contains a search bar with the text 'search..'. Below the 'Support Product' search bar is a list of 'Cloud Support Products' with a vertical scrollbar. The list includes the following items, each preceded by a purple icon with three horizontal bars: CAESAR II, Cloud, CloudWorx for Smart 3D, CloudWorx for Smart Review, EcoSys, Intergraph Spoolgen, PDS Shell, and PPM Partner Community. At the bottom of the list is an orange button labeled 'Search All Products'.

\* Account

Internal Demos [INTER]

\* Support Product

search..

Cloud Support Products

- CAESAR II
- Cloud
- CloudWorx for Smart 3D
- CloudWorx for Smart Review
- EcoSys
- Intergraph Spoolgen
- PDS Shell
- PPM Partner Community

Search All Products

As fields are populated, the smart case creation flow continually searches Knowledge Articles and updates the **Recommended Solutions** list based on input so far.

\* Contact

John Demo

Q

\* Account

Internal Demos [INTER]

X

Q

\* Support Product

Smart Instrumentation

X

Q

Subject

Summarize your issue...

Description

Add more details here...

Next

Recommended Solutions

KNOWLEDGE

April 13

SPI does not Recognize Adobe Reader on Installation

Trying to install SPI on a new server. ... Adobe Reader XI version 11 is installed and opens up PDF files without any problems. ... During the install, SPI does not think a PDF reader exists on the...

Details

KNOWLEDGE

April 13

Delivered DDP Library Groups not Supported in SP\_3D

The Instrumentation DDP library has elements that do not support integrated placement that come delivered. ... Currently they need to be manually removed for each project. ... Reported in version: ...

Details

KNOWLEDGE

April 14

MSSQL Connection Error When Launching SPI or Admin

Connection Failed messages when trying to open a newly created domain in SPI: ... After, an SQL Server Login prompt asks for the password to the domain schema. ... When entered then I receive the f...

Details

**Subject** — Enter a summary of the issue or question.

**Description** — Enter more details about the issue/question.

\* Support Product

Smart Instrumentation

X

Q

Subject

Linux compatibility for Oracle Database server

Description

Has Smart Instrumentation 2019 been certified and confirmed compatible to operate with the Linux Oracle database server?

Next

Click **Next**.

At any point during the case creation flow, review the recommended Knowledge Articles to see if any of the Articles answer the question or solve the issue being reported. There are a few methods of reviewing a Knowledge Article for relevancy.

Look at the Article Title.

KNOWLEDGE

11/30/2020

Linux Server Compatibility with SPI

Has SPI been certified and confirmed compatible to operate with a Linux database server? ... Not version specific  
... As of 10.28.2019, Hexagon PPM has not tested using Linux/Unix so this environme...

Details ▾

Review a snippet of the Article.

KNOWLEDGE

11/30/2020

Linux Server Compatibility with SPI

Has SPI been certified and confirmed compatible to operate with a Linux database server? ... Not version specific  
... As of 10.28.2019, Hexagon PPM has not tested using Linux/Unix so this environme...

Details ▾

Expand to see the Article Details.

KNOWLEDGE

11/30/2020

Linux Server Compatibility with SPI

Has SPI been certified and confirmed compatible to operate with a Linux database server? ... Not version specific  
... As of 10.28.2019, Hexagon PPM has not tested using Linux/Unix so this environme...

Details ▾

Product: Smart Instrumentation

Record Type: Support

Get a Quick View (text-only) of the Article.

KNOWLEDGE

11/30/2020

Linux Server Compatibility with SPI

Has SPI been certified and confirmed compatible to operate with a Linux database server? ... Not version specific...  
10.28.2019, Hexagon PPM has not tested using Linux/Unix so this environme...

Details ▾

Quick View

Click the Article title to go to a full HTML-formatted view of the Article

KNOWLEDGE

11/30/2020

### Linux Server Compatibility with SPI



Has SPI been certified and confirmed compatible to operate with a Linux database server? ... Not version specific  
... As of 10.28.2019, Hexagon PPM has not tested using Linux/Unix so this environme...

[Details](#) ▾

#### Linux Server Compatibility with SPI

Linux Server Compatibility with SPI

🕒 Nov 30, 2020 · Knowledge

#### TITLE ⓘ

Linux Server Compatibility with SPI

#### ARTICLE RECORD TYPE

Support

#### ISSUE

Has SPI been certified and confirmed compatible to operate with a Linux database server?

#### ENVIRONMENT

Reported in version: Smart Instrumentation v2016 (11.00.00.0951)

Not version specific

#### RESOLUTION

As of 10.28.2019, Hexagon PPM has not tested using Linux/Unix so this environment is not part of the Compatibility Matrix.

If customer insists on using Linux/Unix, they should test carefully to confirm acceptable operation. If issues arise, Hexagon PPM will attempt to reproduce the issue in the supported environment and, if duplicated, attempt to resolve the issue. If the issue occurs only in the Linux/Unix then we cannot give commitment to fix it .

#### CAUSE

Informational

#### URL NAME

37206-linux-server-compatibility-with-spi

Was this article helpful?



0

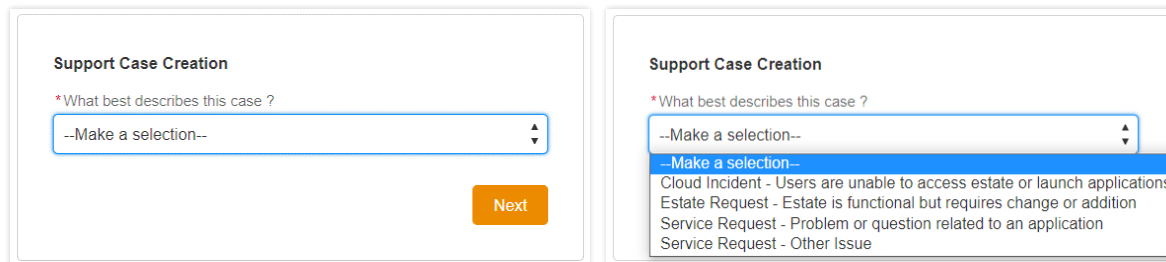


0



After viewing the Article, please consider providing feedback on whether you found the Knowledge Article helpful. Voting **Like** (👍) or **Dislike** (👎) on the ***Was this article helpful?*** poll helps improve the quality of the knowledge base.

**What best describes this case?** — Select the response that best represents this case.



Support Case Creation

\* What best describes this case ?

--Make a selection--

Next

Support Case Creation

\* What best describes this case ?

--Make a selection--

--Make a selection--

Cloud Incident - Users are unable to access estate or launch applications

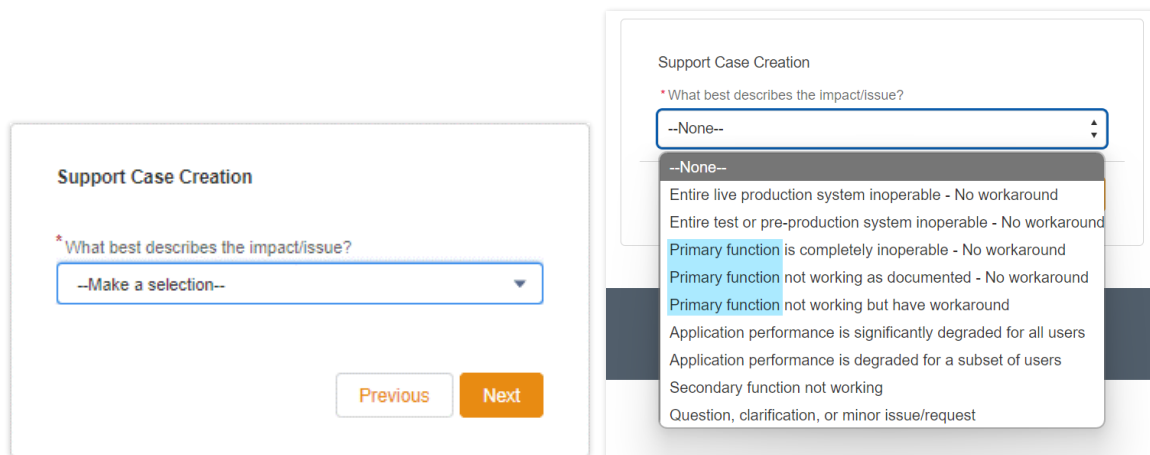
Estate Request - Estate is functional but requires change or addition

Service Request - Problem or question related to an application

Service Request - Other Issue

Click **Next**.

**What best describes the impact/issue?** — Select the response that best represents this case. **Please Note:** A “primary function” is defined as a function that is in the critical path of a deliverable.



Support Case Creation

\* What best describes the impact/issue?

--Make a selection--

Previous Next

Support Case Creation

\* What best describes the impact/issue?

--None--

--None--

Entire live production system inoperable - No workaround

Entire test or pre-production system inoperable - No workaround

Primary function is completely inoperable - No workaround

Primary function not working as documented - No workaround

Primary function not working but have workaround

Application performance is significantly degraded for all users

Application performance is degraded for a subset of users

Secondary function not working

Question, clarification, or minor issue/request

Click **Next**.

**Note:** At this point in the case creation flow, some product centers ask product-specific questions. This is done to gather information that will be helpful to the support analyst who will be working the case so the analyst can provide more efficient support. Some examples are below.

### Support Case Creation

\* Subject  
Module XYZ running slowly

Description  
Module XYZ running slowly for all users in the module.

\* App Server  
Oracle Web Logic 9.2

\* Environment  
Production

\* Database  
Oracle 10g

\* EcoSys Release  
8.6.x

\* Instructions on how to reproduce the issue  
Open Module XYZ and sort by date.

\* Problem Frequency  
Consistently Reproducible

\* When did this issue start happening?  
1 June 2020

\* Has this ever worked previously  
yes

\* Current known workarounds  
none

Previous Next

### Support Case Creation

\* Subject  
Install ISL Client U8 or later on my estate VMs

\* Description  
Install ISL Client U8 or later on my estate VMs.

\* Reason for Change  
Need to see decrypted usernames in ISL portal.

\* Requested Completion Date  
Mar 1, 2021

\* Additional Supporting Comments  
N/A

\* Testing Required  
Verify that decrypted username is visible in ISL portal.

\* Distribution  
karen.customer@alpha.account.com

External Reference Number

Previous Next

**Problem Frequency** — Select the frequency of the problem from the drop-down list.

**Support Case Creation**

\* Subject  
Linux compatibility for Oracle Database server

\* Description  
Has Smart Instrumentation 2019 been certified and confirmed compatible to operate with the Linux Oracle database server?

Instructions on how to reproduce issue

\* Problem Frequency  
--Make a selection--  
--Make a selection--  
Consistently Reproducible  
Intermittent  
Not Applicable

**Product Version** — Enter the Version of the Product that you are having queries/issues with

\* Problem Frequency  
--Make a selection--  
--Make a selection--  
Consistently Reproducible  
Intermittent  
Not Applicable

Has this ever worked previously?

Current known workarounds

\* Product Version  
10.28.2019

**External Reference Number** — This field is for your own use such as to record a reference/tracking number that is internal to your organization.

Current known workarounds

\*Product Version

10.28.2019

External Reference Number

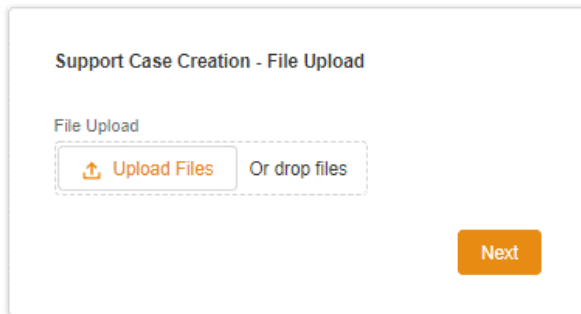
I

Previous

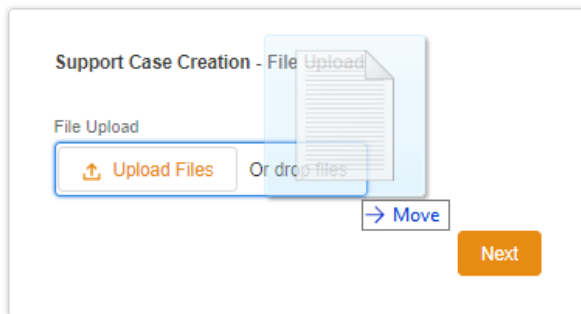
Next

Click **Next**.

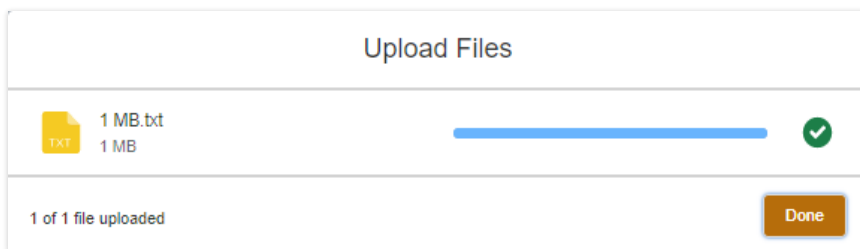
**Support Case Creation - File Upload** — This step is optional. If you need to attach files to this case, you can do so now or after the case is created from the case detail's view.



To upload files, drag up to 10 files onto the blue area shown below or click **Upload Files** to browse to one or more files to upload.



As the files upload, a progress bar will indicate the progress of each file.



When all files have finished uploading, click **Done**. You will be taken back to the upload tool in case you need to attach more files. [Note: Case attachment file size limit is 2GB.](#)

### Support Case Creation - File Upload

File Upload




Upload Files

Or drop files

Next

When you are done uploading all files, click **Next**.

You will be taken to the case details view. This confirms successful submission of your support case.

 Case  
00138497

Priority  
4 - Low

Status  
Open

Case Record Type  
Service Request

Post


Share an update...


Share

Sort by:

Most Recent Activity

Search this feed...

 [John Demo](#) (Cloud Test 1) created this case.  
1m ago


 00138497


[View more details](#)

Like


Comment

Write a comment...

 Articles (0)

 Files (1)

Upload Files

Title	Owner	Last Modified	Size
 <a href="#">Smart Instrumentation</a>	<a href="#">John Demo</a>	6/30/2021 11:38 AM	126KB

[View All](#)

General

Account Name Reporting  
Internal Demos

Site ID  
INTER

Contact Name  
[John Demo](#)

Status ⓘ  
Open

Assigned Analyst  
Awaiting Assignment

Date/Time Opened  
6/30/2021 11:36 AM

Date/Time Closed

Priority  
4 - Low

Sub Status

Description

Subject ⓘ  
Linux compatibility for Oracle Database server

Description ⓘ  
Has Smart Instrumentation 2019 been certified and confirmed compatible to operate with the Linux Oracle database server?

Extended Status

Product & Impact

Support Product Name  
Smart Instrumentation

Reported Version  
10.28.2019

Case Origin ⓘ  
Community

Module

Best Describes Case  
Service Request - Problem or question related to an application

Best Describes Impact/Issue  
Question, clarification, or minor issue/request

External Reference Number

**Note:** Files that you attached to a case can be deleted from the above view. You cannot delete files uploaded by someone else.

**Note:** Cases cannot be closed via Smart Community. Your case will be closed by your assigned Analyst once your issue is resolved.

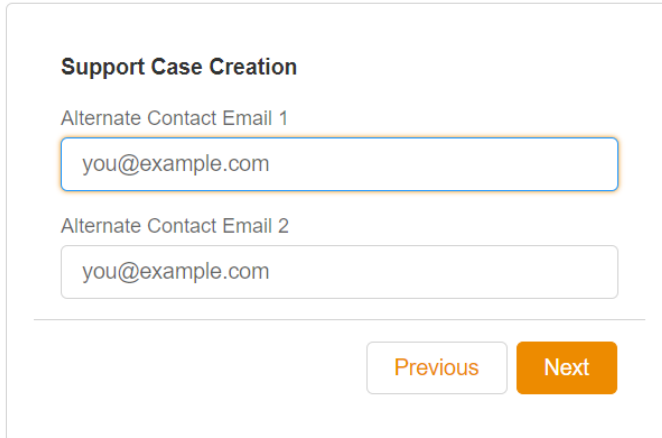
23

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## Adding Case Alternate Contacts

You have the option of adding one or two additional contacts' email addresses to be included in all case communication sent by Hexagon. Any system-generated emails that are sent to you (the Case Contact) will also be sent to **Alternate Contact Email 1** and **Alternate Contact Email 2**. Likewise, when your Support Analyst contacts you by email, the Alternate Contact Emails will be Cc'd. There are two places where you can designate alternate contacts on a case-by-case basis.

### 1. During Case creation



**Support Case Creation**

Alternate Contact Email 1

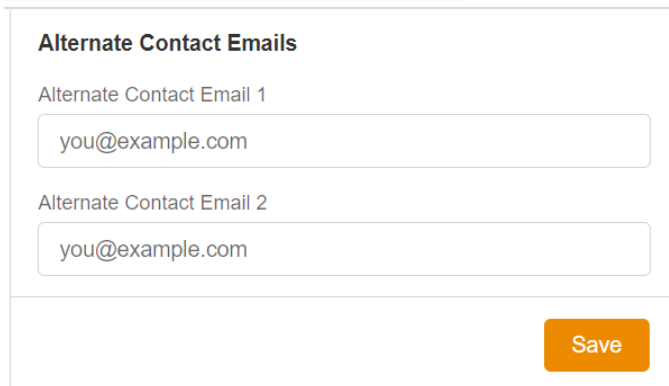
you@example.com

Alternate Contact Email 2

you@example.com

Previous Next

### 2. On an existing Case, you can update **Alternate Contact Email 1** and **Alternate Contact Email 2** in the **Alternate Contact Email** section on the Case layout.



**Alternate Contact Emails**

Alternate Contact Email 1

you@example.com

Alternate Contact Email 2

you@example.com

Save



---

## Searching for a Case

The **Cases** menu will contain all the Cases related to your account. By default, this list view will display all Cases that were created a month ago from the current date. If a Case does not appear in this list view, adjust the filters. To save the filter, click **Save Search** to have this filter applied by default.

Cases

search...

Save Search Clear Saved Search

From Nov 7, 2023 To

☐ My Cases Only ☐ Escalated to Management Only ☐ Active Only ☐ Closed Only

Reset

Export CSV

Case Number	Subject	Account	Site Id	Analyst	Contact	Status	Sub Status	Product	Priority	Create D... 4
-------------	---------	---------	---------	---------	---------	--------	------------	---------	----------	---------------

First Prev 1/1 Next Last

Create a Support Case

---

## Following a Case

The **Follow** button that is located on the **Cases** tab in Smart Community will place any new Chatter communication from that Case into your Chatter Feed. Your Chatter Feed can be found on the Homepage of Smart Community at the bottom of the screen.



Sort by:

Most Recent Activity ▼

Search this feed...



**Note:** This function will not notify you of any outgoing emails or Case updates that are made in the Case. If you would like to be included in any outgoing email communication on the Case, we suggest contacting the Case Owner to communicate this request.

## Escalating a Case to Management

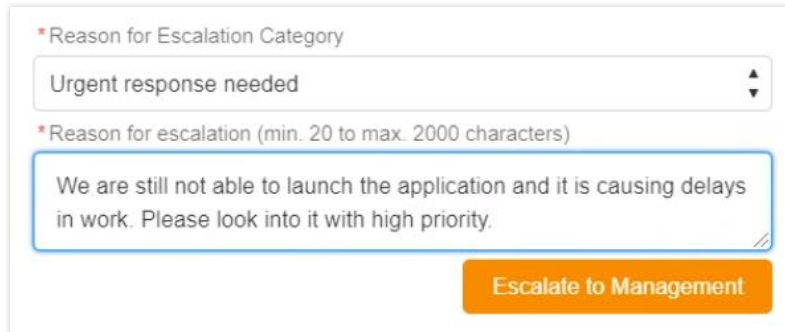
The **Escalate to Management** feature provides the ability to bring a Case to the attention of Support management for review and assistance. While viewing the details of a Case that meets the criteria for escalation, the Case can be escalated using the **Escalate to Management** section.

The screenshot displays the Hexagon Case Management interface. At the top, there is a navigation bar with the Hexagon logo and links for Home, Cases, Documentation, and Useful Links. Below the navigation bar, the case details for Case 00161896 are shown, including its Priority (3 - Medium), Status (Open), Management Escalation, and Case Record Type (Service Request). A '+ Follow' button is visible in the top right corner. The main content area features a 'Post' section with a text input field and a 'Share' button. Below this is a 'Sort by' dropdown menu set to 'Most Recent Activity' and a search bar labeled 'Search this feed...'. A feed entry shows that the case was updated by 'My Case Analyst (Hexagon PPM)' on September 30, 2021, at 11:40 AM. The entry includes a priority update from '2 - High to 3 - Medium' and options to 'Like' or 'Comment'. On the right side, the 'Escalate to Management' section is highlighted with a red box. It contains a dropdown menu for 'Reason for Escalation Category' (currently set to '--None--') and a text area for 'Reason for escalation (min. 20 to max. 2000 characters)' with the placeholder text 'Escalate this case to management. Include details such as impact on project, number of users impacted, etc.'. An 'Escalate to Management' button is located at the bottom of this section. Below the red box, the 'General' section provides additional case details: Account Name Reporting (TEST Customer Acct), Site ID (US00000000), Contact Name (John Demo), Status (1), Date/Time Opened (9/30/2021, 11:36 AM), Date/Time Closed, Priority (3 - Medium), and Sub Status.

For a Case to qualify for escalation, the Case cannot be linked to a Change Request (CR) and cannot be closed. The priority of the Case determines how quickly after creation the **Escalate to Management** feature appears on a Case.

- If **Priority = 1 - Critical**, Case creation date/time must be > 4 hours ago
- If **Priority = 2 - High**, Case creation date/time must be > 24 hours ago
- If **Priority = 3 - Medium** or **4 - Low**, Case creation date/time must be > 14 days ago

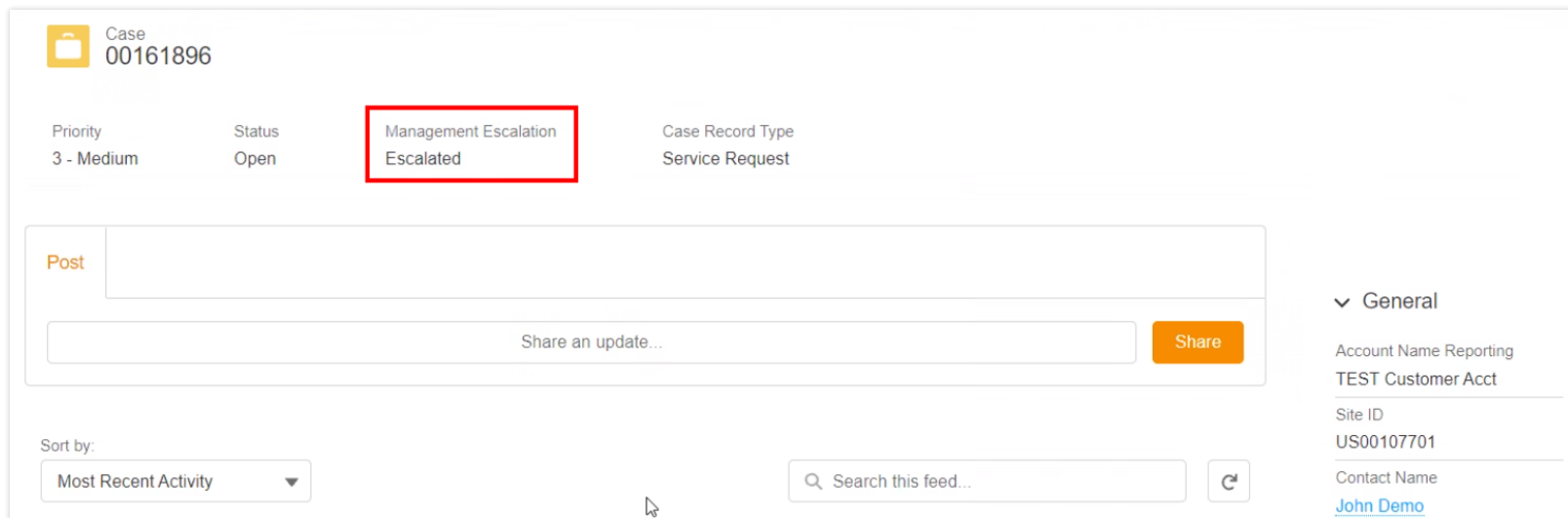
To escalate a Case to Support management, select a **Reason for Escalation Category** and provide justification in the **Reason for Escalation** text box as shown below:



The **Escalate to Management** button becomes active after the required fields have been populated. Successful escalation is confirmed by the below message:

This case is escalated to management. You will be contacted as soon as possible.

Once a Case is escalated, management will review the Case and the **Reason for Escalation** and reach out to you with a de-escalation plan, and the **Management Escalation** status will show **Escalated**.



Upon your approval of the de-escalation plan, the Case will be de-escalated by Support management. Now, management and the Support analyst will work with you on the Case per the de-escalation plan. Once a Case is de-escalated, the **Escalate to Management** section reappears and can be used one last time, if needed.

If the Case is escalated a second time, the Case will be handled similarly. **Management Escalation** will show **Re-escalated**. A confirmation message will appear on the screen and will remain as a reminder that the Case cannot be escalated again. A re-escalated Case is not de-escalated.

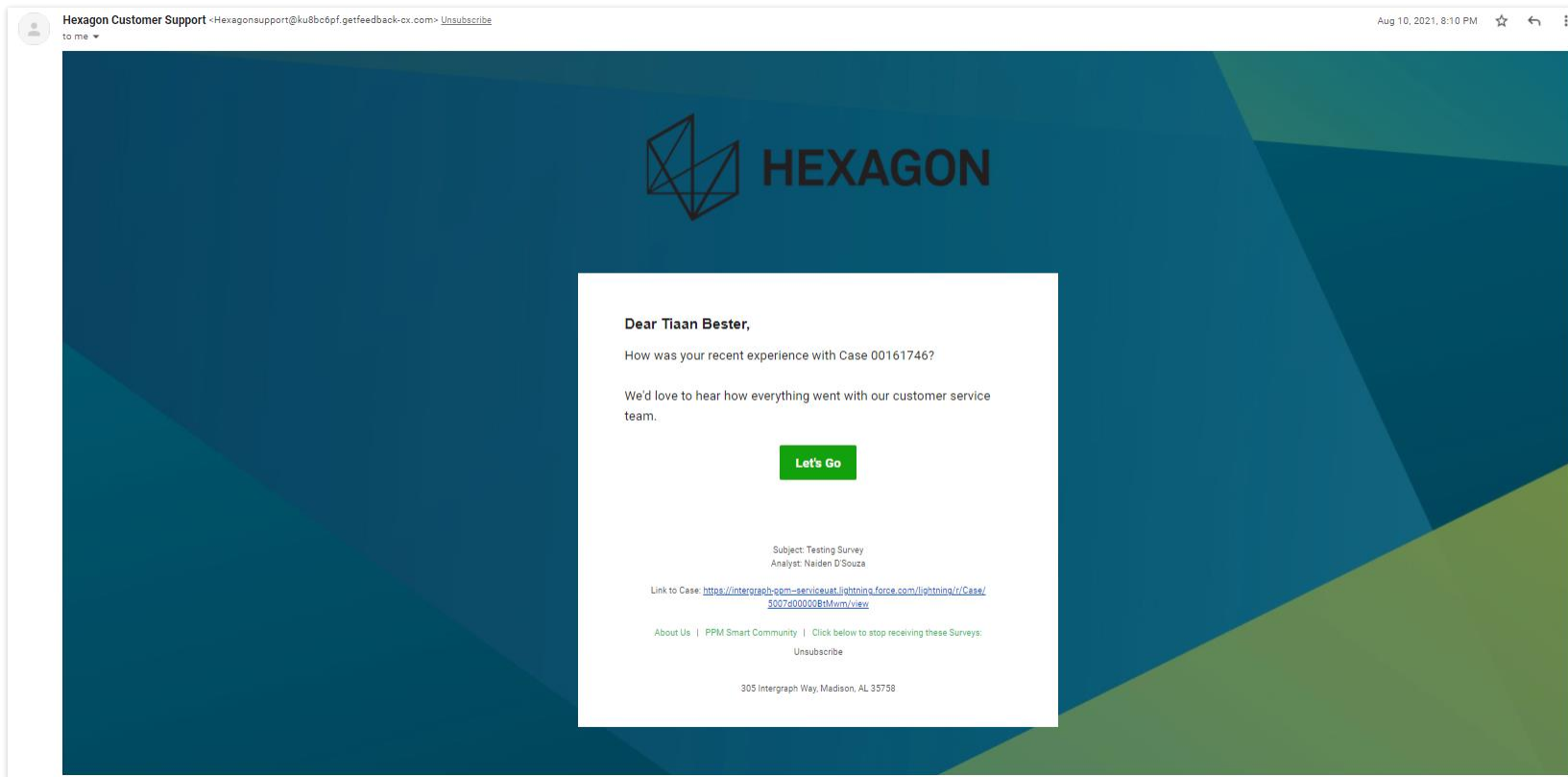
The screenshot displays a case management interface for Case 00161891. The case details include: Priority 1 - Critical, Status Owner Assigned, Management Escalation Re-escalated (highlighted with a red box), and Case Record Type Service Request. A confirmation message on the right states: "This Case has been re-escalated to management. It will remain escalated until closure." (also highlighted with a red box). Below the message, there is a "Post" button, a text input field for "Share an update...", and a "Share" button. The bottom right section shows "General" information: Account Name Reporting TEST Customer Acct and Date/Time Opened 9/29/2021, 9:05 AM. A "Sort by:" label is visible at the bottom left.

You can view the Escalated cases by Checking **Escalated to Management Only** button in **Cases** section. For more information visit [Viewing and Searching Existing Cases](#) section.

---

### Submitting a Satisfaction Survey

Every time a support analyst closes a Case, you will receive an email to submit a survey to share your experience related to the Case. The email will be from Hexagon Customer Support <DoNotReply@Hexagon.com>. Open the email and click on the **Let's Go** button which will take you to the Getfeedback website (<https://hexagon.getfeedback.com/example>) to submit your responses.



Please complete the survey and click on Submit at the end, you can also enter any comments or suggestions in the text box. Every survey response is reviewed by management and management may reach out to you to get more details.

---

### Subscribing to and Unsubscribing from Receiving Survey Emails

The survey functionality is provided by GetFeedback.com, a third-party service. When you submit your first survey, then you will automatically be subscribed to the GetFeedback service. Rest assured that your responses and contact information will not be shared with anyone. You can unsubscribe from receiving support-related survey invitations at any time by clicking the **Unsubscribe** link at the bottom of the survey email.

If you want to resubscribe, please send an email to [crm.us.ali@hexagon.com](mailto:crm.us.ali@hexagon.com) stating your desire to be resubscribed. CRM will forward the email to GetFeedback. The forwarded email serves the purpose of confirming to GetFeedback that you want to be resubscribed.

---

## Documentation

The **Documentation** link at the top of the page opens the [Hexagon Documentation](#) site in a new browser tab. The **Documentation** on the **Home** page does the same.

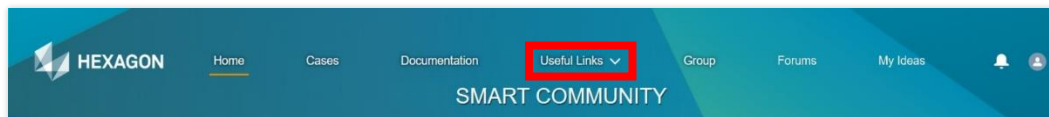


There you will find the latest revisions of product documentation can be found. You can bookmark the Documentation site and visit it anytime without logging in to **Smart Community**.

---

## Useful Links

The **Useful Links** menu at the top of the page gives you access to some additional support-related documents and web apps that you may find helpful.



**Useful Links** targets open in a new browser tab.

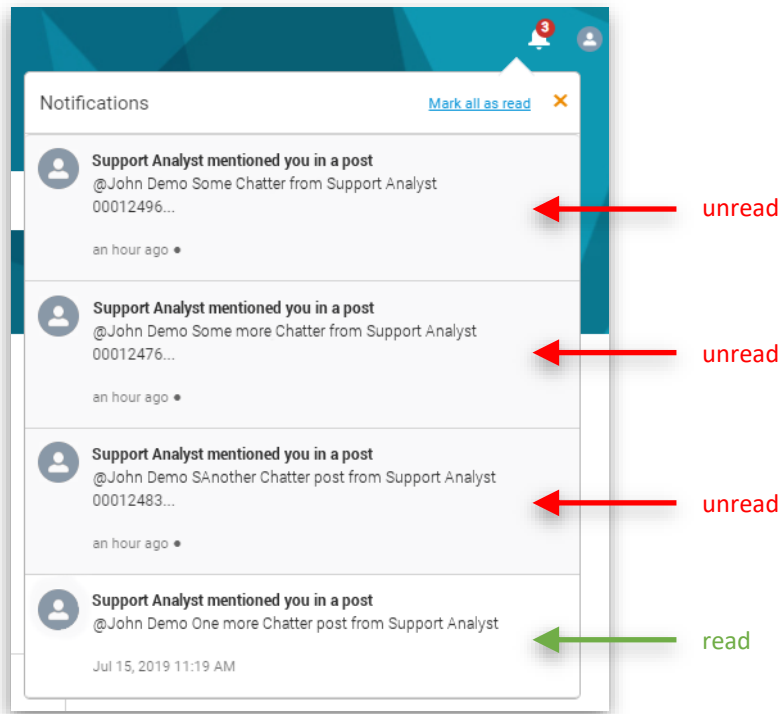
- **Additional License Restrictions** — License restriction information for various products and platforms.
- **Application Security** — Critical security vulnerabilities identified in released products.
- **Internationalization** — Guidelines on the proper creation and maintenance of homogeneous environments during software installation.
- **OS and DB Service Pack Policy** — Hexagon Support Policy for OS and database application service packs and critical updates.
- [Product Compatibility](#) — Hexagon Compatibility Matrix — Product Report.
- **Product Releases Schedule** — Hexagon’s current expected commercial release dates for new versions of certain products.
- **User Guide - Smart Community** — A guide for using Smart Community (this document).

## Notifications

The **Notifications** count in the header of **Smart Community** indicates the number of unread [Chatter](#) posts.



Click on the icon to see a list of recent Chatter posts. **Unread posts** are indicated by a light grey background.



Click on a post to view the entire history of that Chatter thread.


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## User Menu

The user menu is in the top-right corner of the page.



From the user menu, you can do the following:

- **Home** — Return to the Home page.
- **My Profile** — Update your contact information and upload a profile picture to replace  if you prefer.
- **My Settings** — Update your Email address, Password, Language, Locale and Time zone details.
- **Logout** — Log out of the Community

---

## Ideas

Have a great idea for a new product feature, enhancement, or user experience improvement? Visit the **Ideas** portal and submit that idea to Hexagon’s Solution Design team.

The **Ideas** portal is the medium for users of Hexagon software solutions to submit requests for enhancements. After being triaged and categorized, Ideas are made visible on the Ideas portal. Other users can review posted Ideas and consider voting for them. Highly voted Ideas will be periodically reviewed for inclusion in future release plans.

Ideas are not linked to Support Cases, because Ideas and Support Cases serve different purposes. If a Support Case is determined to be a request for a new feature, the Case will be closed, and the support analyst will recommend submitting the enhancement request on the Ideas portal.

There are different means of viewing Ideas—directly in Smart Community and in the Ideas portal—each described below:

1. Two views are accessible directly in Smart Community for quick reference. Once logged in to Smart Community, click on the **My Ideas** menu

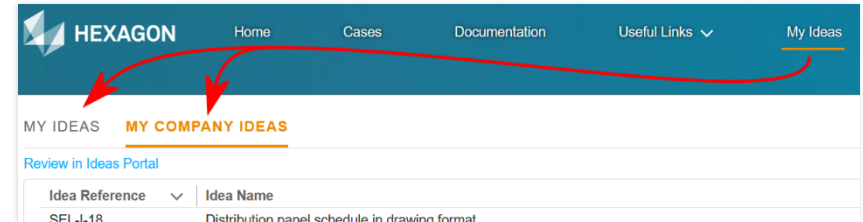




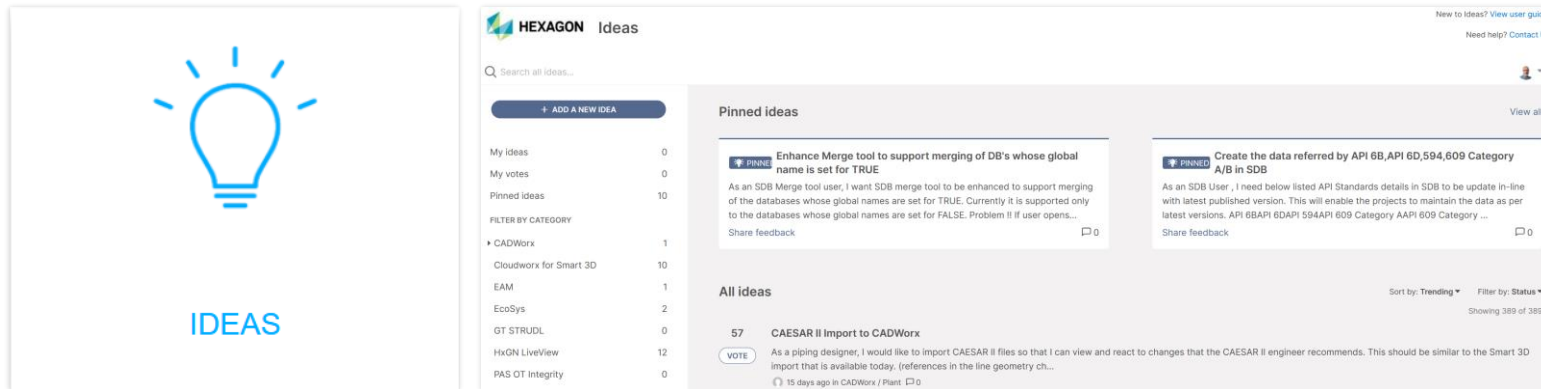
option at the top of the page. Then you can choose from two lists views:

- **MY IDEAS** — Lists Ideas that you have submitted.
- **MY COMPANY IDEAS** — Lists Ideas that users from your company have submitted.

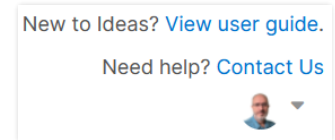
Note the **Idea Reference** of the Idea you are interested in reviewing, then click **Review in Ideas Portal**. This will take you to the Ideas portal where you can find that Idea by its **Idea Reference**.



2. On the **Home** page of Smart Community, click the **IDEAS** tile to open the Ideas portal in a new browser tab.



Once in the Ideas portal, you will see two links at the top-right corner of the page. These links provide access to the Ideas portal user guide as well as a method to contact the Ideas team if you have questions about using the portal.



## View Closed Cases Transferred to Ideas

Cases that were closed and transferred to Ideas can be found under the **Customer Dashboard**. Scroll down this dashboard until you see **Case Transferred to Ideas or Submit New** chart. To transfer this data to excel, please refer to the [For Export – All Cases All Fields Report](#) section of this guide.

Case Transferred to Ideas or Submit New				
Case Number ↑	Subject	TR/CR External Status	Account Name	Date/Time Opened
00013174	SDx Projects, Create New Document, Select CFHOS Classification from list requires unacceptable scrolling	Closed-Transferred to Ideas	Cargill Inc.	8/16/2019, 10:53 AM

## Development Items

If your support case is determined to be a Defect, then your Case will be linked to a Development Item. Solution Development will analyze the defect and prioritize it among other Development Items. As the Development item progresses through its lifecycle and certain Milestones are reached, the case will be updated. When your Case is first linked to a Development Item, the Case **Status** will be set to **Open Dev Item**. The **Open Dev Item** status indicates that your issue is being worked on by our developers. Your case will stay in **Open Dev Item Status** until the linked Development item is closed. Once the Development item attached to your Case is closed, your Case will be closed with a **Status** of **Closed Dev Item**, and you will receive a notification.

The **Development Item Information** section is located on the right side panel on the Case layout.

Development Item Information

Dev Item Number

Planned Release

External State

Planned Release Date

Severity

Implemented Version

Other Dev Tracking #

Has Been Released

Notifications will be sent when the **External State** of the Development Items changes.

- **External State** – calculated field that changes based on values set for Bugs and Security Vulnerabilities linked to cases.
- **Dev Item Number** – Azure DevOps work item number to identify the associated Bug or SV

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## Support Forums

Hexagon's Support Forums is a peer-to-peer discussion board that allows Hexagon Asset Life Cycle Intelligence division customers to post questions, engage in conversation, share knowledge, and suggest solutions to posted questions. The purpose of Support Forums is to allow Smart Community users to share knowledge with and help others in the community.

**Important Note:** Hexagon Support personnel do not actively monitor the forums to answer questions. Support Forums are meant for engagement amongst customers. If you do not find an answer to your question in the Support Forums or in the [Knowledge base](#), then you can submit a [Support Case](#).

---

### Welcome to Support Forums

On the landing page, notice the below three main sections:

- Support Forums topics, grouped by common products
- **Top Contributors** leader board
- **Trending Discussions Across All Topics**

[Home](#)
[Cases](#)
[Documentation](#)
[Useful Links](#)
[Support Forums](#)

SUPPORT FORUMS

3D DESIGN & VISUALIZATION

SMART 3D

TRANSLATORS

SMART 3D ADMINISTRATION

DELIVERABLES

SDX

MODELING

VOLUME MANAGEMENT

PRODUCTION

SMART INTEROP PUBLISHER

REFERENCE DATA

SMART ISOMETRICS

OPERATIONS & MAINTENANCE

J5

REPORTING

CONTROL WIZARD

CONFIGURATION

SAAS

DOCUMENTATION AND RATIONALIZATION

INDUSTRAFORMS

USER EXPERIENCE

IPL ASSURANCE

INTEGRATION

PAS PLANTSTATE INTEGRITY

MOBILITY

ALARM MANAGEMENT

ASSET LIFECYCLE INFORMATION MANAGEMENT

SMARTPLANT FOUNDATION

SDX

VISUALIZATION

DOCUMENT MANAGEMENT

BUSINESS ADMINISTRATION

WORKFLOWS

REPORTS

DATA CAPTURE

WEB CLIENT

SECURITY

DATA VALIDATOR

SPO

VIEW AND ANNOTATE

DOCUMENT AND DATA MANAGEMENT

CADWORX & ANALYSIS

TOP CONTRIBUTORS

Ishero

Level 3

293 Points

MrVK

Level 2

116 Points

shero.laura

Level 2

111 Points

J.Demo

Level 2

66 Points

tesha.means.eamuel

Level 2

61 Points

jenningsm0800

Level 1

36 Points

aabbu2

Level 1

33 Points

Mr.MB

Level 1

33 Points

achav

Level 1

16 Points

susiqbn

Level 1

11 Points

Trending Discussions Across All Topics

## User Profile in Forums

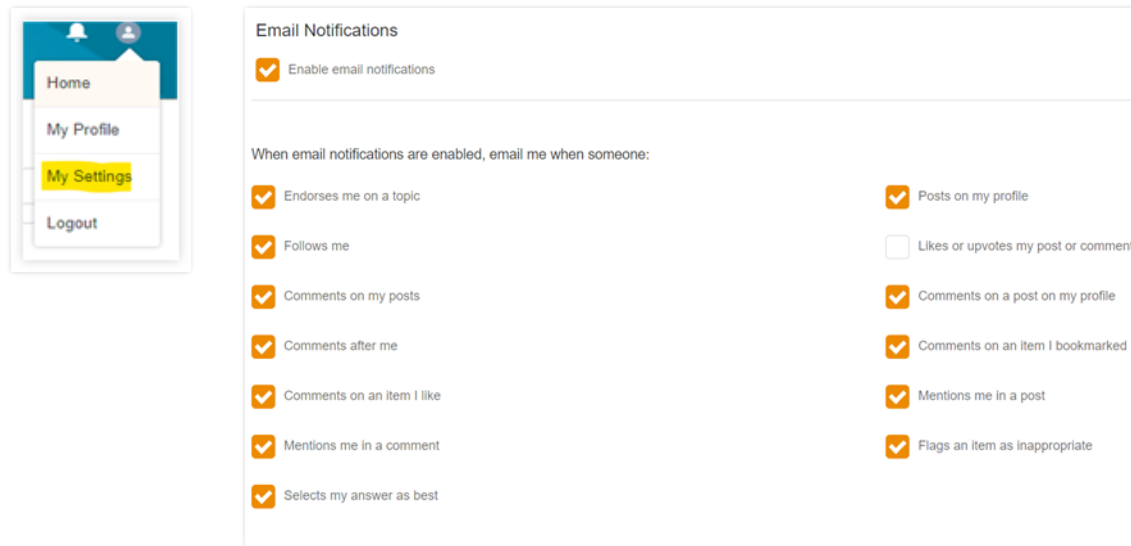
From the **Profile** icon, select **My Profile**. Here, you can change your nickname on the Support Forums, including optionally uploading a profile picture that will be visible in **Support Forums** discussions.

36

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## Support Forums Notifications

You can also choose which Support Forums notifications you wish to receive by going to the **Profile** icon > **My settings** > **Email Notifications**.



---

## Discussions

Discussion topics in the Support Forums are organized in a hierarchy of up to five levels.

- The top level consists of groups of Support Products that are related based on function.
- The second level is comprised of individual Support Products.
- The third level is made up of groups of common functional areas of the parent Support Product.
- The fourth and fifth levels are used optionally to further organize discussions into common topics.
- Users are encouraged to ask a question at any of these levels.

SUPPORT FORUMS		
• 3D DESIGN & VISUALIZATION		
◦ SMART 3D	TRANSLATORS	◦ SMART REVIEW
AUTOMATION	SMART 3D ADMINISTRATION	◦ PDS
DELIVERABLES	S3DX	◦ SMARTSKETCH
MODELING	VOLUME MANAGEMENT	◦ INTERGRAPH FREEVIEW
PRODUCTION	◦ SMART INTEROP PUBLISHER	◦ CLOUDWORX FOR SMART 3D
REFERENCE DATA	◦ SMART ISOMETRICS	
• OPERATIONS & MAINTENANCE		
◦ J5	REPORTING	CONTROL WIZARD
CONFIGURATION	SAAS	DOCUMENTATION AND RATIONALIZATION
INDUSTRAFORMS	USER EXPERIENCE	IPL ASSURANCE
INTEGRATION	◦ PAS PLANTSTATE INTEGRITY	
MOBILITY	ALARM MANAGEMENT	
• ASSET LIFECYCLE INFORMATION MANAGEMENT		
◦ SMARTPLANT FOUNDATION	◦ SDX	VISUALIZATION
DOCUMENT MANAGEMENT	BUSINESS ADMINISTRATION	WORKFLOWS
REPORTS	DATA CAPTURE	WEB CLIENT
SECURITY	DATA VALIDATOR	◦ SPO
VIEW AND ANNOTATE	DOCUMENT AND DATA MANAGEMENT	

Follow Support Forum Discussion Thread

The Follow option will appear on the right of the screen once you select a Discussion.



You can choose to Follow a Discussion Thread to be notified of any new Discussions under a Topic. Email Notifications **must be enabled** for the Notifications to be sent out. Please refer to [Support Forums Notifications](#) section in this guide to enable notifications.

## Asking Questions

Navigate to your desired topic and view posts to see if your question has been asked. Once you have clicked on the desired topic, review all the questions/posts that relate to this topic.

If you do not find the information you are seeking, then you can select the **Ask a Question** button.

- The **Ask a Question** button will appear on the top right of the screen after clicking on a topic.
- The following is required when you select **Ask a Question**:
  - **Post To** — Select the desired Forum on which to post a question.
  - **Question (Enter up to 255 Characters)** — Enter a summary of what you would like to know.
  - **Details** — If you have more to say or ask, add those details here.
  - **Add Topic** — This ensures your post is tailored to a specific topic. A drop-down menu will appear to display the available Topics.
  - **Ask** — Submit your question to the forum.

---

### Searching Support Forums

To search in Support Forums, go to your desired topic and click **Ask a Question**.

---

## SMART 3D

[AUTOMATION](#) | [DELIVERABLES](#) | [MODELING](#) | [PRODUCTION](#) | [REFERENCE DATA](#) | [TRANSLATORS](#) | [SMART 3D ADMINISTRATION](#) | [S3DX](#) | [VOLUME MANAGEMENT](#)

IONS

t Activity ▼



Ask a Question

Follow

This will bring up a popup that allows you to search this topic. Begin typing your question and a list of similar results will appear as you type.

\* = Required

\* Post To

Smart 3D

\* Question (Enter up to 255 characters)

Type Question here.

> Details

Cancel Ask

If the question does not exist, proceed to ask a new question.

---

### Selecting the Best Answer

Once a user has posted a question, peer users will be able to view the question and offer comments/solutions. Then, the original poster can review the answers posted, and can mark the one that was most helpful in solving their issue as the “best answer.”


From a Support Forums response, the original poster will have the option to Select as Best to indicate that the response was the solution that helped the customer resolve their issue. Once the **Select as Best** button is used, the answer will get pinned to the top of the forum, making it visible to others as the Best Answer.

---

### Removing the Best Answer

If the original poster decides that an answer is not the best answer after all, they will have the option to clear the **Select as Best** flag. To do so, navigate to the comment and select **Remove as Best**.



 Selected as Best • Upvote • Remove as Best

---

### Create Support Case via Support Forums

If you are unable to find an answer, you will have the option to **Create a Support Case**. This button will redirect you to the Case Creation Flow, and your case will be routed accordingly. You can find the **Create a Support Case** button located at the bottom of any Discussions page.

Still didn't find what you're looking for?

Create a Support Case

---

### Discussion Interaction

When interacting with an existing Discussion, you can **Upvote**, **Answer**, or **Share the Question**. Additionally, you can **Downvote** and/or **Flag** a post in drop-down menu on the right. **Down vote** indicates item was not helpful to you. The **Flag** option alerts Hexagon of possible inappropriate posts.

---

### Top Contributors Leader board

Earn points and climb to new levels when you contribute to the experience. The Leader board will display the Top 10 users' points and Recognition Level.

TOP CONTRIBUTORS			
	Ishero 3 Level 3	288 Points	
	MrVK 2 Level 2	116 Points	
	shero.laura 2 Level 2	111 Points	
	tasha.means.eamuat 2 Level 2	56 Points	
	aabbu2 1 Level 1	33 Points	
	Mr.Mil 1 Level 1	33 Points	
	jenningsm0880 1 Level 1	31 Points	
	achav 1 Level 1	16 Points	
	susiqbcn 1 Level 1	11 Points	
	EamO'N 1 Level 1	6 Points	

To track your points and Recognition Level, hover over your nickname anywhere it is found in Support Forums. Your **Recognition Badges** can be found under **My Profile** at the bottom of screen.

---

## Trending Discussions


Trending Discussions Across All Topics shows the Discussions that are trending in Support Forums. You can **Sort by *Top Posts*, *Latest Posts*, or *Most Recent Activity***.

### Trending Discussions Across All Topics

Sort by:

Top Posts

Search this feed...



[tasha.means.eamuat](#) (First Student and First Transit)

asked a question.

August 25, 2022 at 3:00 PM

#### Where do you setup users in EAM?


EAM

Upvote

Answer

Share

1 answer · 3 views



[J.Demo](#) (Cloud Test 1)

an hour ago

Smart Community

Upvote · Reply · Select as Best

Scroll down this feed to load more discussions.

---

## User Profile

---

### My Profile

From the user menu, select **My Profile** to view your profile. Click **Edit** if you wish to update/add your name and contact information. This information is not required.

Charlie Customer

Edit

Name	Title
Charlie Customer	Best Customer
Manager	Company Name
	Alpha Account

About Me

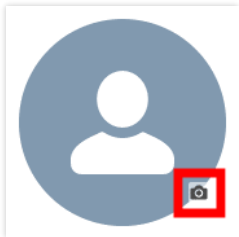
Note: This info is not displayed on the Community. It is visible only to Hexagon employees. This field is optional.

Email	Phone
<a href="mailto:charlie.customer@gmail.com">charlie.customer@gmail.com</a>	+1.256.xxx.xxxx
Mobile	Fax
+1.256.xxx.xxxx	+1.256.xxx.xxxx

Address

[305 Intergraph Way](#)  
[Madison, Alabama 35758](#)  
[United States](#)

You can upload a profile picture if you wish. Click the camera icon to upload a new profile picture.



## My Settings

From the user menu, select the **My Settings** option where you can update your Account details like Email Address and Password, and change the **Locale** and **Time Zone** from the dropdown. You will also be to enable email notifications for support when in **My Settings**.

**Note:** Pick the GMT offset that represents your local time zone.

- Email Notifications can be enabled in **My Settings**. On the **My Settings** page, scroll until you see **Email Notifications**

---

## Downloads

The **Downloads** tile on the **Home** page will open the Hexagon Downloads app in a new browser tab. There you can download service packs, hot fixes, utilities, technical notes, whitepapers, and more.



DOWNLOADS

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## Support Notification Subscriptions

Solution Support occasionally sends out notification to subscribers about their products. To receive support notifications, you must opt in and subscribe to the products of interest to you. Below are the types of support notifications that you can subscribe to:



SUBSCRIPTIONS

- Product Release
- Service Pack / Hot Fix Release
- Content Release
- Product Roadmap Updates
- Application Security

To subscribe, click the **Subscriptions** tile on the **Home** page. The Subscriptions app will open in a new browser tab. Select the notification types you are interested in receiving. Select all the products that interest you. Scroll to the bottom of the page and be sure to select the licensing products in use at your site. Click **Submit**.

To unsubscribe, uncheck the notification types in products that are no longer interest to you and click **Submit**. To unsubscribe from all notification types and all products, scroll to the bottom then click **Uncheck All** and then click **Submit**.

---

## Dashboard

To see a dashboard of your cases, click on the **Dashboard** tile on the **Home** page. Dashboards will provide information and will serve as a visual representation of your support cases. Your cases are graphed and grouped by:

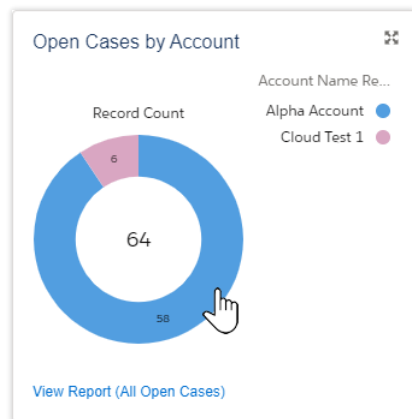


DASHBOARD


- Account
- Length of time open

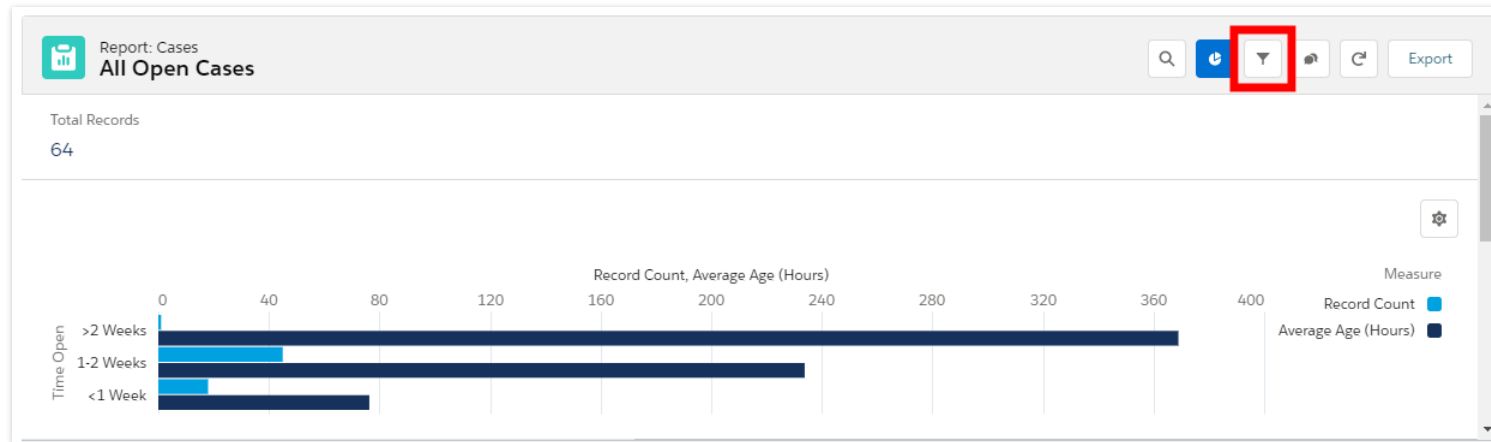
- Length of time to be resolved.
- Product
- Status
- Dev Item association
- etc.

The Dashboard consists of different reports. Each report generates a graph to help you visualize the breakdown of the cases in report and chart. Below is an example of the **Open Cases by Account** chart.



In this example, the user has an association to two Accounts—**Alpha Account** and **Cloud Test 1**. At a quick glance, the user can see that there are 6 Open cases related to the Cloud Test 1 Account, and 58 related to Alpha Account. Click on a chart segment to see a list of cases represented by the segment.

At the bottom of any chart, click **View Report** to see the tabulated report that is the source of the chart. To see the filter criteria that were used to capture the report's data, click the **Filters** button (  ) at the top-right corner of the report.

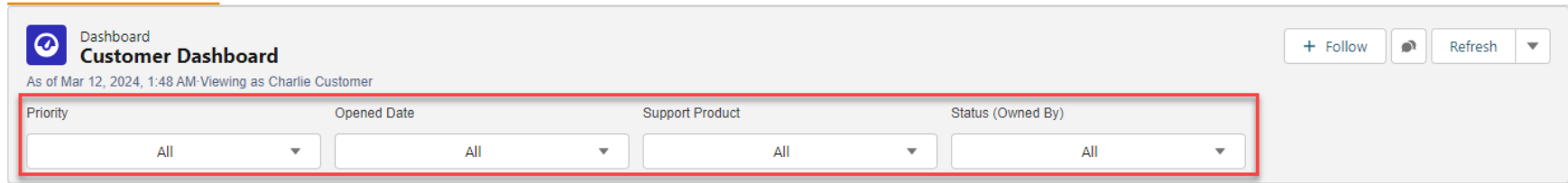


You can update the filters to produce a report and chart that shows a different subset of cases that you want to review.

## Customer Dashboard

There are filter settings located on the **Customer Dashboard** that you can modify.

### CUSTOMER DASHBOARD



The filters available **Customer Dashboard**:

- **Priority** — The choices for case Priorities are **1 - Critical** and **2 - High** grouped together or **3 - Medium** and **4 - Low** together.
- **Opened Date** — The date the case was created.
- **Status (Owned By)**—Whether each case is currently Owned By (waiting on action from) a support analyst, the customer/you, by Support+Development, or just Development. Hover over each option to see a definition.

After selecting a different filter, the charts below will update to reflect the latest filter choices. Please allow a few seconds for each background report to update and the charts to be redrawn.

### For Export - All Cases All Fields Report

If the standard reports and charts do not display the case data you want or if you wish to build charts of your own, you can export the data, format it how you want, and build the charts you need. To export all cases and all case fields, click the **View Report...** link at the bottom of the **For Export - All Cases All Fields** report.

**Note:** Like with all other charts/reports in this Dashboard, this report is based on the three filters at the top of the dashboard.

For Export - All Cases All Fields

Account Name ↑	Contact Name	Site ID	Case Number	Subject
Alpha Account	Karen Customer	ZZ00106927	00024367	Fatal Error 1234
Alpha Account	MarioUAT1 Böhmer	ZZ00106927	00050854	Test case for SPx ENT
Alpha Account	Karen Customer	ZZ00106927	00050859	test
Alpha Account	Karen Customer	ZZ00106927	00050869	Test
Alpha Account	DanielUAT1 Alcazar	ZZ00106927	00050876	test problem
Alpha Account	AndyUAT1 De Vine	ZZ00106927	00050877	Unable to open Spec Sheet
Alpha Account	VijayUAT1 Atmuri	ZZ00106927	00050882	Application Issue
Alpha Account	DanielUAT1 Alcazar	ZZ00106927	00050883	how to create a wiring diagram
Alpha Account	ChristopherUAT1 C...	ZZ00106927	00050884	TEST

[View Report \(For Export - All Cases All Fields\)](#)

When you export the **All Cases All Fields** data, you can choose to export the data as an Excel (.xls) file or a Comma-Separated Value (.csv) file. From the raw data export, you can reformat and reorganize the data however you wish as well as build your own charts.



Report: Cases  
For Export - All Cases All Fields

Account Name	ContactNameFormula	Site ID	Case Number	Subject	Description
2	-	-	<a href="#">20190101</a>	<a href="#">Case</a>	<a href="#">Case</a>
3	<a href="#">Case</a>	<a href="#">Case</a>	<a href="#">20190101</a>	<a href="#">Case</a>	<a href="#">Case</a>
4	<a href="#">Case</a>	<a href="#">Case</a>	<a href="#">20190101</a>	<a href="#">Case</a>	<a href="#">Case</a>
5	<a href="#">Case</a>	<a href="#">Case</a>	<a href="#">20190101</a>	<a href="#">Case</a>	<a href="#">Case</a>

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## Product Compatibility

The Compatibility Matrix lists system requirements and compatibility information for each product. To access the Compatibility Matrix, click **Product Compatibility** on the **Useful Links** menu. The Hexagon Compatibility Matrix app will open in a new browser tab. Search by Product and Version to view relevant compatibility information.

The screenshot shows the Hexagon Compatibility Matrix web application. On the left is a teal sidebar with a 'Reports' icon and two menu items: 'Product Search' and 'Dependencies'. The main content area has a header with the Hexagon logo and the title 'Hexagon Compatibility Matrix'. Below the header is a 'Product Search' section with two dropdown menus: 'Product' set to 'CAESAR II' and 'Version' set to '2019 (11.00)'. Below these menus, the application details are displayed: 'CAESAR II / CAESAR II', 'Version: 2019 (11.00)', 'Release Date: May 2019', and 'Report Date: 11/17/2021 11:38:26 PM'. The interface is divided into sections for 'Remote Client Technology', 'Operating Systems' (with a sub-item 'As Supported By Application'), 'Enterprise Client', 'Operating Systems' (with sub-items 'Windows 7 32-bit', 'Windows 7 64-bit', and 'Windows 10'), and 'Enterprise Virtualization'.

**Note:** Always visit the Compatibility Matrix live rather than saving a local copy, because the information may be updated at any time.

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## Product Releases Schedule

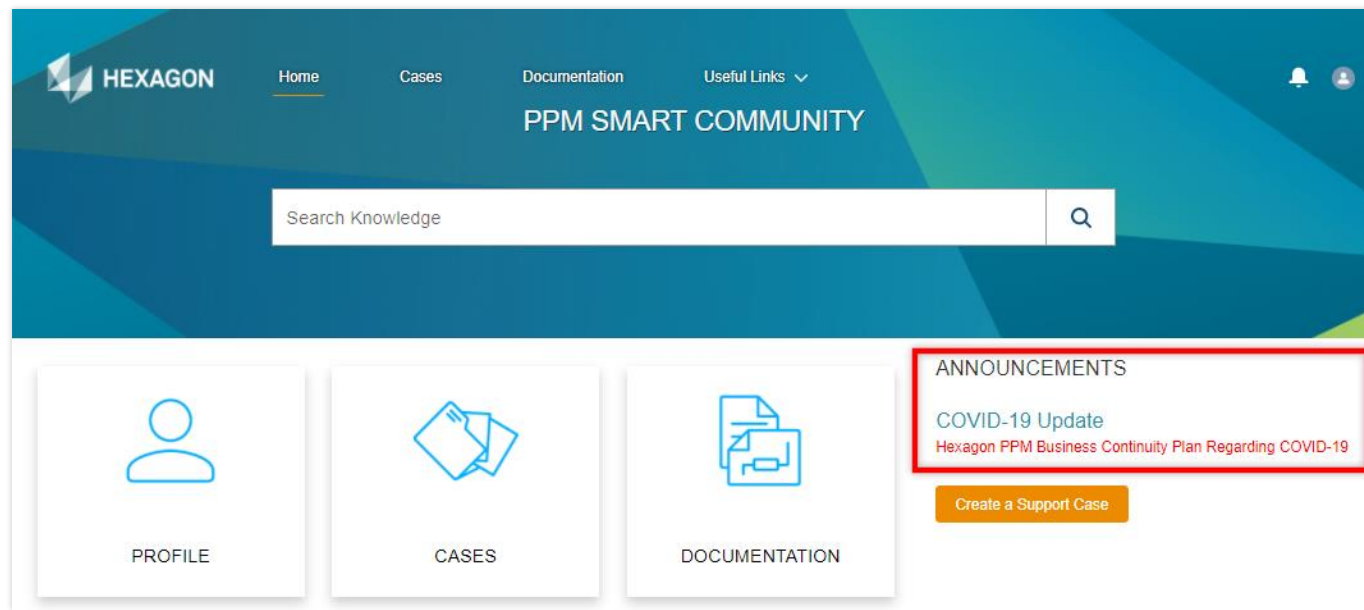
The Product Releases Schedule is a report of expected commercial release dates for new versions of products.

**Note:** Always consult the live copy of the Product Releases Schedule rather than saving a local copy, because the information may be updated at any time.

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## Announcements

The Announcements pane is where Solution Support posts information about upcoming changes to or planned downtimes of the support site.



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## Methods of Updating a Case

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### Waiting on Customer Status Reminder

When your Case Owner updates your Case, the Case status will be updated to **Waiting on Customer**. You will receive an email when your Case status is initially updated. If you have not responded to your Case Owner in 7 days, you will be sent an automated reminder that will state your Case Status is still in Waiting on Customer. Another reminder will be sent after 11-days. After 15 days of your Case being in **Waiting on Customer** status, you will be sent an email indicting your Case may be Closed due to No response.

You may update your Case Owner by using Chatter, and Email described below. We recommend updating your Case Owner daily to prevent your Case being closed automatically due to no response.

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## Chatter

Chatter is quick, simple, in-system communication between support analysts and customers. Chatter is used for communication directly from the case. Chatter is not a live chat medium; however, it can be used for direct back-and-forth communication if both parties—customer and support analyst—are actively monitoring and responding to Chatter notifications.

Since Chatter is started from a case, it is always saved on the case for you, others at your company, and Hexagon support analysts to have access to view.

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### Who Can Chatter On a Case



- A support analyst — any support analyst, not just the individual assigned to the case
- The Case contact — the customer or you
- Another contact — any other user who is associated to the account indicated on the case such as your colleagues

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### Rich Formatting

Chatter can include basic HTML text formatting, hyperlinks, attachments, and inline images such as screenshots.

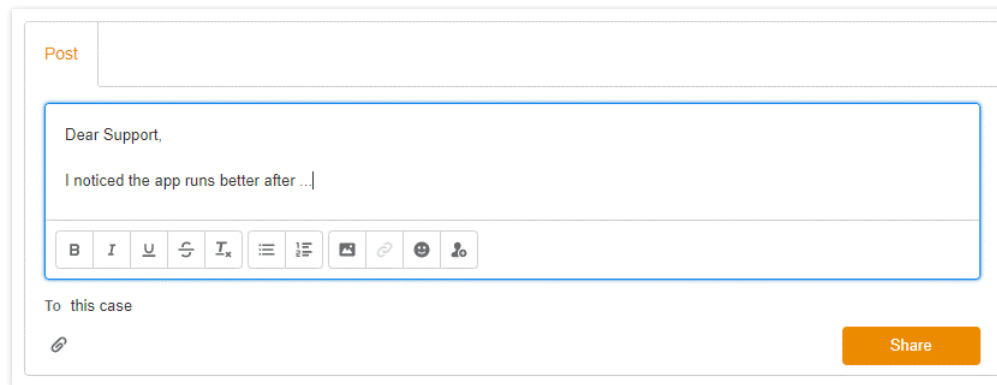


To format text, select text to be formatted in **bold**, *italics*, underline, etc., and then use the appropriate formatting control. To insert an inline image, use the **Image** tool (  ). To attach a file, use the **Attachment** tool (  ).

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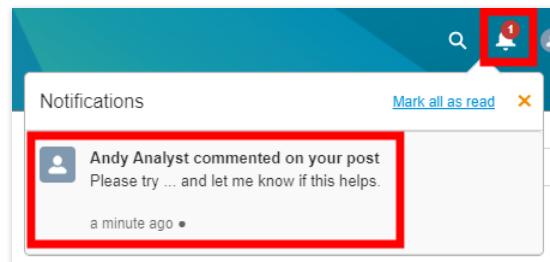
## Examples of Using Chatter

After you create a case on **Smart Community**, you can begin communicating with the support analyst who will be assigned to your case, even prior to assignment. For example, you can provide more information than you originally included in your case submission, or you can ask further questions.

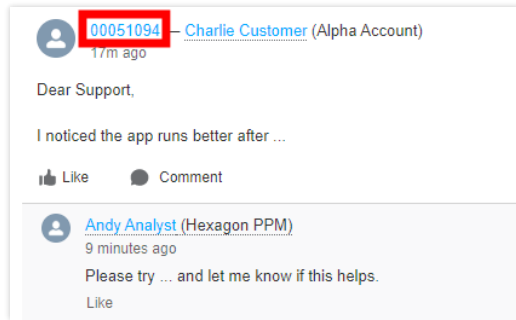


The screenshot shows a 'Post' form. At the top left is a 'Post' label. Below it is a text input area containing the text 'Dear Support,' followed by a line 'I noticed the app runs better after ...'. Below the text area is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), strikethrough (ABC), link (chain), unlink (chain with slash), image (img), and user (person). Below the toolbar is a 'To this case' label with a link icon. At the bottom right is an orange 'Share' button.

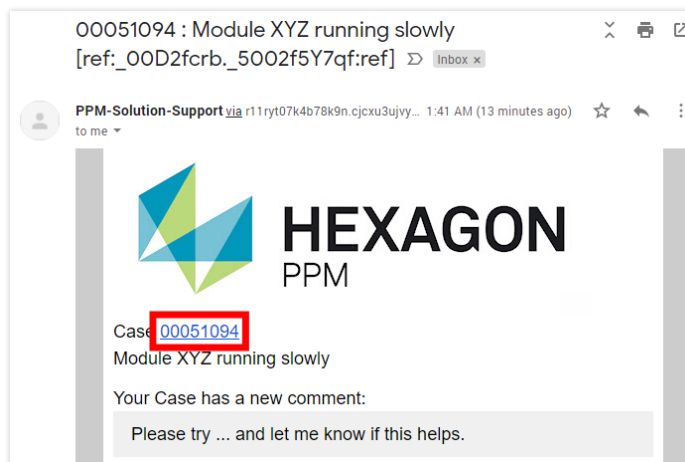
The support analyst who is assigned to your case will be notified of the incoming Chatter on the case. When the analyst replies to your Chatter, you will receive a notification of a new comment. Click on the bell icon to see a preview of the Chatter. Click on the preview to go to the Chatter post on the case.



At the top of the Chatter thread, click the case number to go to the case details view.



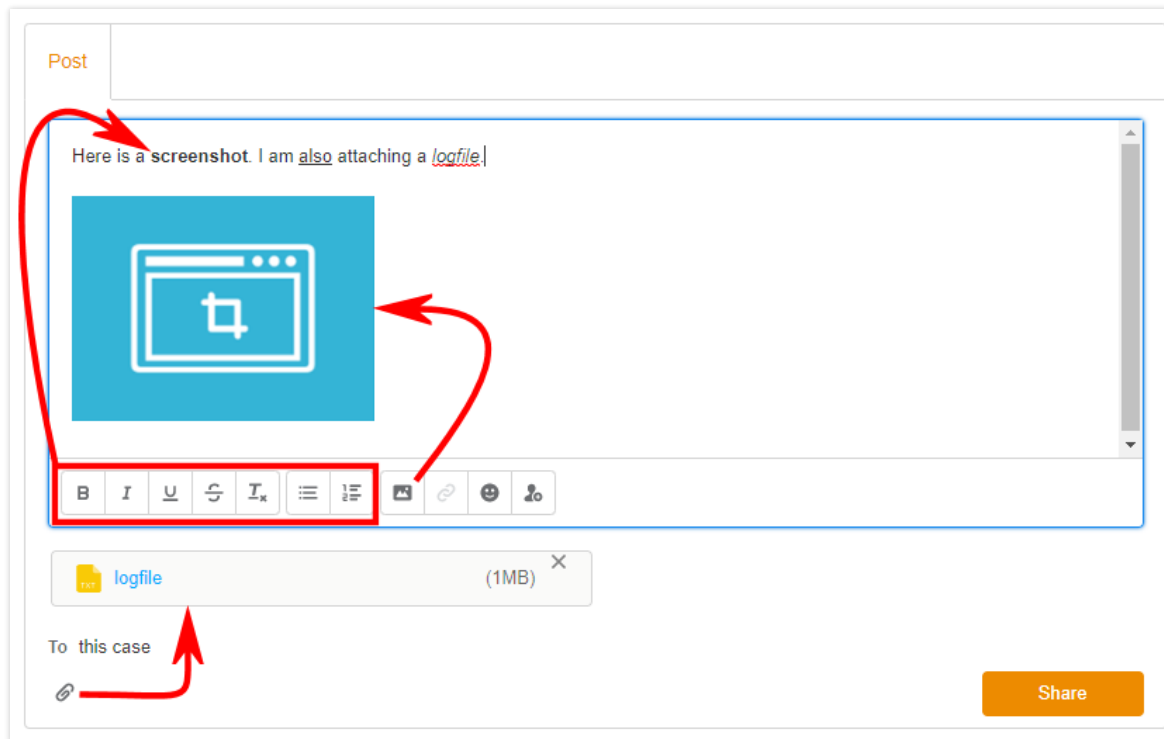
You will also receive an email copy of the Chatter. The email includes a link that takes you straight to the case. This dual-notification method helps reduce the chance of the recipient missing a Chatter post. The email copy also keeps the user from having to maintain a constant **Smart Community** session to know when a new Chatter post arrives.



You can respond to the Chatter from the post while logged in to the Community or by replying to the Chatter email received. If monitoring and responding via the Community, click on the Notifications bell icon (🔔) and click a post to jump to that post's full thread. When ready to reply, enter comments and post them back to the case.

Chatter can include basic HTML text formatting, hyperlinks, attachments, and inline images such as screenshots. To format text, select the text to be formatted in **bold**, *italics*, underline, etc., and then use the appropriate formatting control. To insert an inline image, use the **Image** tool (🖼️). To attach a file, use the **Attachment** tool (📎).

**Warning:** Do not paste a screenshot/image into the Chatter entry box. Use the **Image** tool mentioned above. Although a pasted image appears successfully inserted in line with your text, the image will be removed after clicking **Share**.



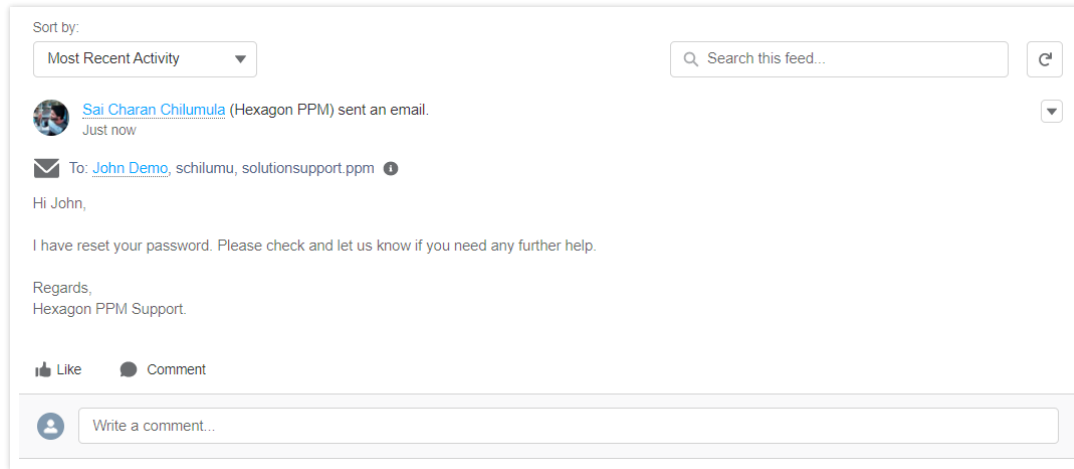
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## Email

A copy of the email conversion will be recorded on your case in **Smart Community** when all the following conditions are met.

1. Your email address is either in the **To** or **CC** field.
2. When [SolutionSupport.ALI@hexagon.com](mailto:SolutionSupport.ALI@hexagon.com) is either in **To** or **CC** field.
3. The system-generated reference id remains in either the **Subject** or **Body** of the email.

You will not be able to reply to the email from Smart Community. However, if you reply-all to the email (which includes [SolutionSupport.ALI@hexagon.com](mailto:SolutionSupport.ALI@hexagon.com) in CC) then the conversation will be recorded in the case.



**Note:** All the users who have access to cases within your company will be able to see the email conversations.



## Revision History

Revision Date	Ver.	Description
27 February 2025	3.29	Added information about the Case attachment File size limit.
22 November 2024	3.28	Fixed incorrect link to FAQ document on title page.
15 October 2024	3.27	Defined 'Primary Function' in Case creation flow.
16 September 2024	3.26	Added <a href="#">Searching in Support Forums</a> section.
19 August 2024	3.25	Adding Waiting on Customer section
1 December 2023	3.24	Added <a href="#">Adding Case Alternate Contacts</a> section.
6 October 2023	3.23	Added <a href="#">Follow a Case</a> section
4 April 2023	3.22	Updated Development Items section with definitions.
9 February 2023	3.21	Added <a href="#">Development Items</a> section
1 December 2022	3.20	Updated <a href="#">Support Browsers</a> Section.
14 November 2022	3.19	Updated Screenshots/Added new section under Ideas: <a href="#">View Closed CRs Transferred to Ideas</a>
20 October 2022	3.18	Added JTS Retirement Information /Support Forums Follow Button Function
12 September 2022	3.17	Fixed broken hyperlinks. Removed unnecessary information.
9 September 2022	3.16	Added <a href="#">Support Forums</a> section.
10 August 2022	3.15	Updated references of PPM to Asset Lifecycle Intelligence division, formerly PPM.
26 July 2022	3.14	Corrected typos.
21 July 2022	3.13	Updated screenshots. Added <a href="#">Ideas</a> section.
18 January 2022	3.12	Updated screenshot to show the location of the <a href="#">ALI University</a> tile on <b>Home</b> page and a brief description of its purpose.
15 December 2021	3.11	Updated <a href="#">Escalating a Case to Management</a> section.
17 November 2021	3.10	Updated <a href="#">Licensing Portal access information</a> and <a href="#">Product Compatibility</a> sections.
03 November 2021	3.09	Updated <a href="#">Viewing and Searching Existing Cases</a> section.
22 October 2021	3.08	Added <a href="#">Escalating a Case to Management</a> section.
06 October 2021	3.07	Updated <a href="#">Unsubscribe or Subscribe from receiving Survey emails</a> section.
13 September 2021	3.06	Updated the <a href="#">Support Notification Subscription</a> section.
13 September 2021	3.05	Updated <a href="#">My Settings</a> section.
30 August 2021	3.04	Removed Internet Explorer from Supported browsers.
24 August 2021	3.03	Added <a href="#">Submitting a Satisfaction Survey</a> section
6 July 2021	3.02	Added the <a href="#">Email</a> section and updated the <a href="#">Submitting a New Support Case</a> flow section.
23 June 2021	3.01	Added <a href="#">My Settings</a> section.
23 January 2021	3.00	Added Knowledge information and updates to case creation flow based on the 25 January 2021 update to <b>Smart Community</b> .
24 July 2020	2.02	Updated screenshots/icons to the latest.
12 July 2020	2.01	Added link to Frequently Asked Questions on the title page.
7 July 2020	2.00	Major update to explain all the new functionality being released in July 2020.
26 September 2019	1.01	
19 September 2019	1.00	The initial release of the document.