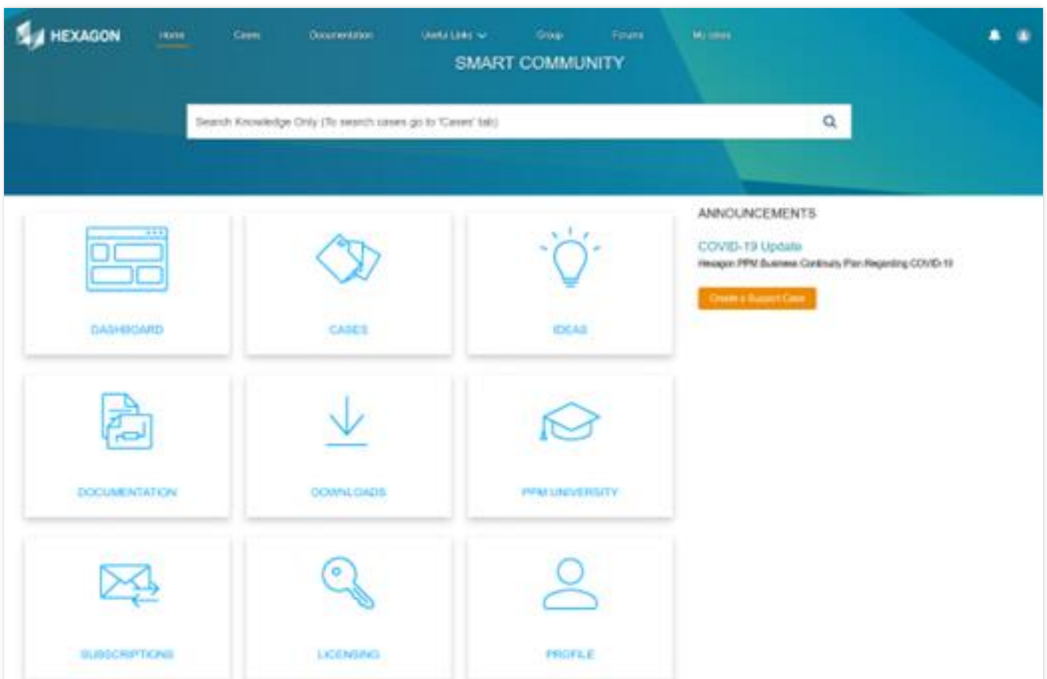


Smart Community

User Guide

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

Frequently Asked Questions

Version:	3.29
Prepared by:	Steve Archibald
Revised:	27 February 2025 Revision History
Revised by:	Lavoris Russell

Contents

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.

Smart Community

The below features reside on the self-support site:

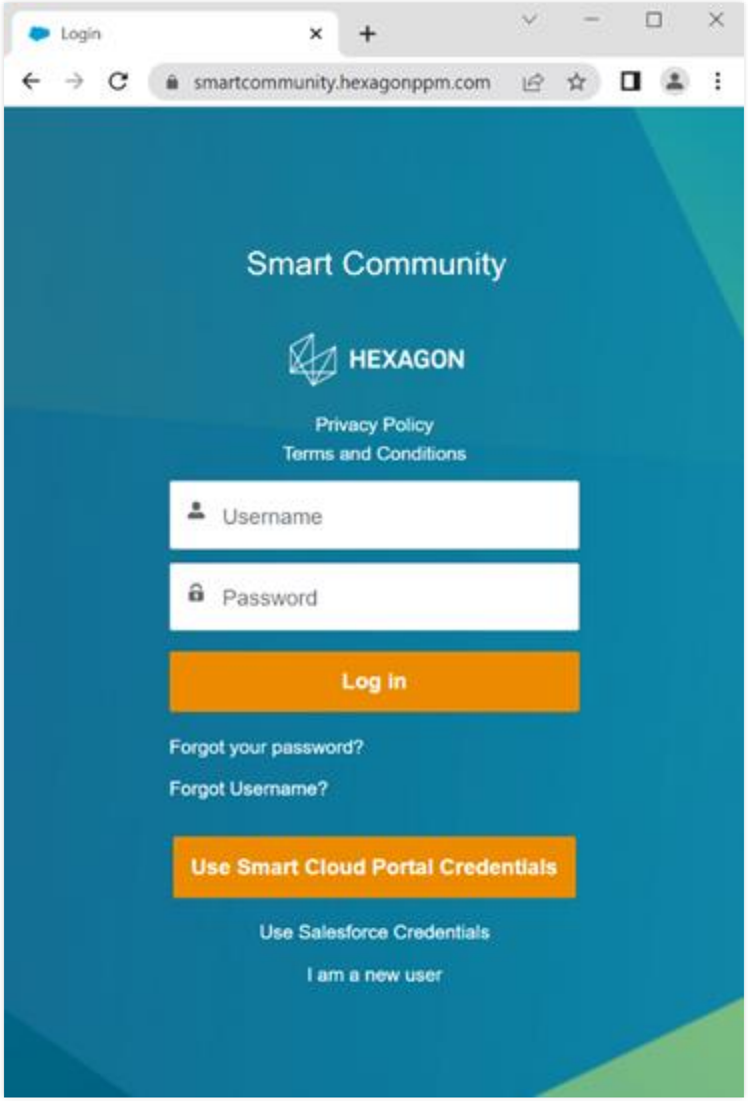
- Announcements
- Cases
- Chatter
- Dashboard
- Documentation
- Downloads
- Knowledge
- Product Compatibility Matrix
- Product Releases Schedule
- Subscriptions
- Support Forums

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.

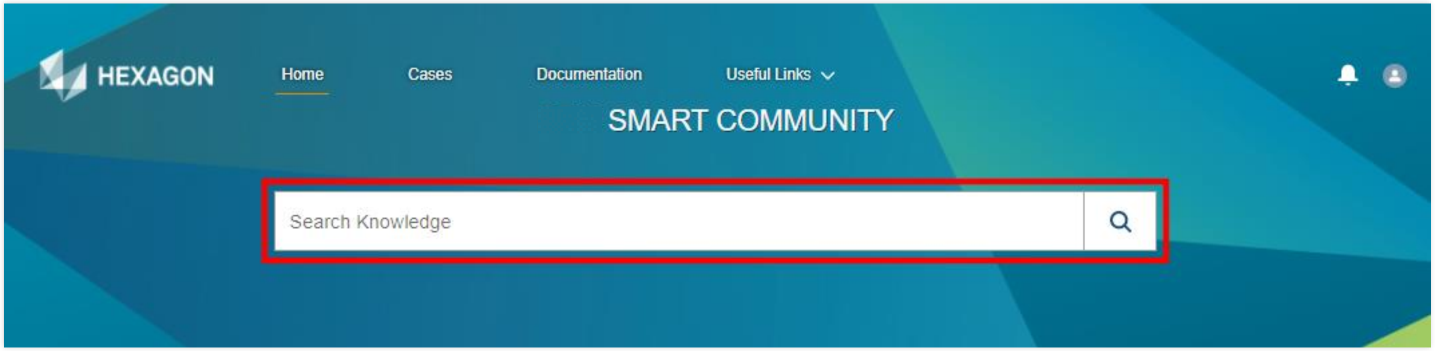
Navigating Smart Community

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

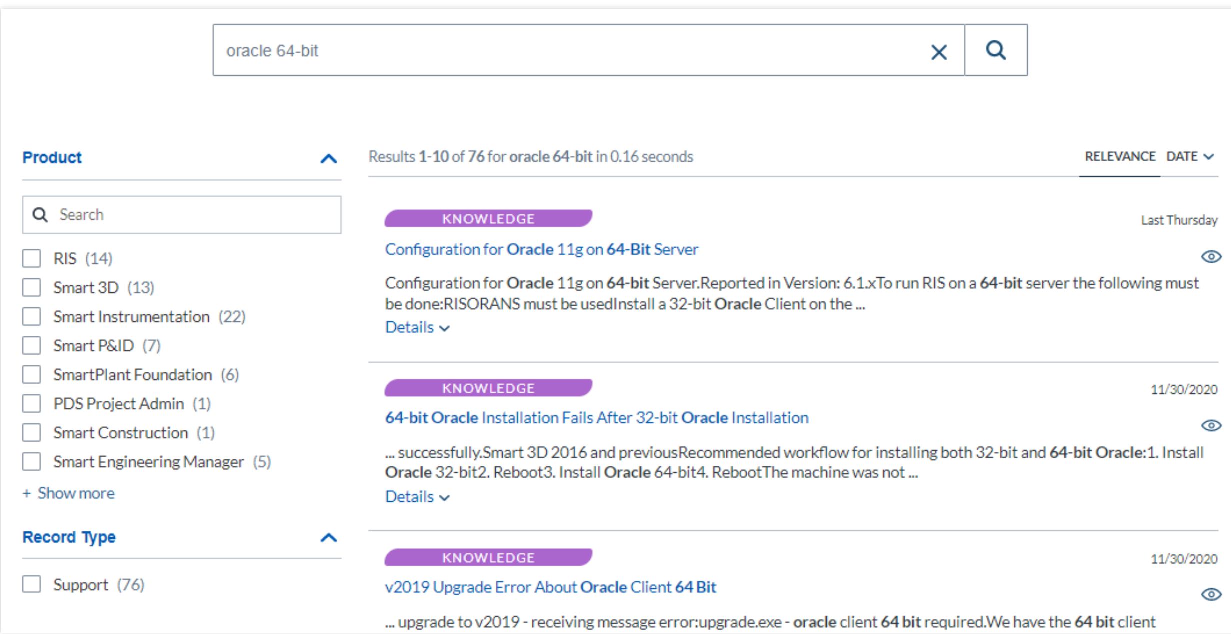
- **Home** — Default landing page after logging in
- **Cases** — View existing support cases
- **Documentation** — Go to the Documentation site
- **Useful Links** — Find additional support-related information
- **Support Forums** — Post questions, engage in conversation with, and get help from other 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 the appropriate support center

Search Knowledge

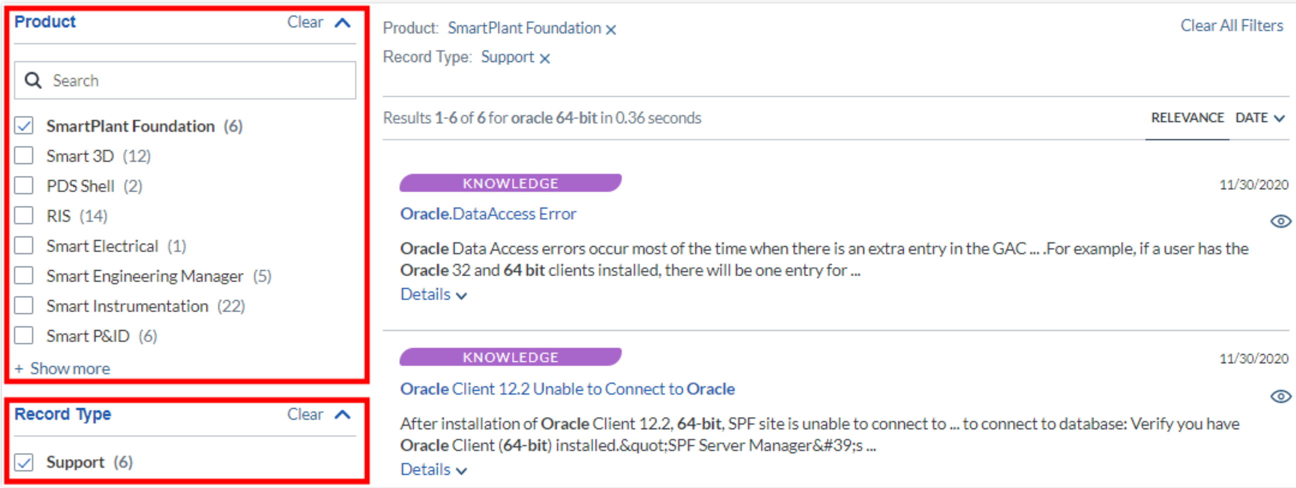
The **Search Knowledge** box near the top of the **Home** page will search across all Knowledge Articles. Users are encouraged to search through Knowledge Articles to see if the current issue/question has already been solved before creating a new case.



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** (🔍) when ready to execute the search.

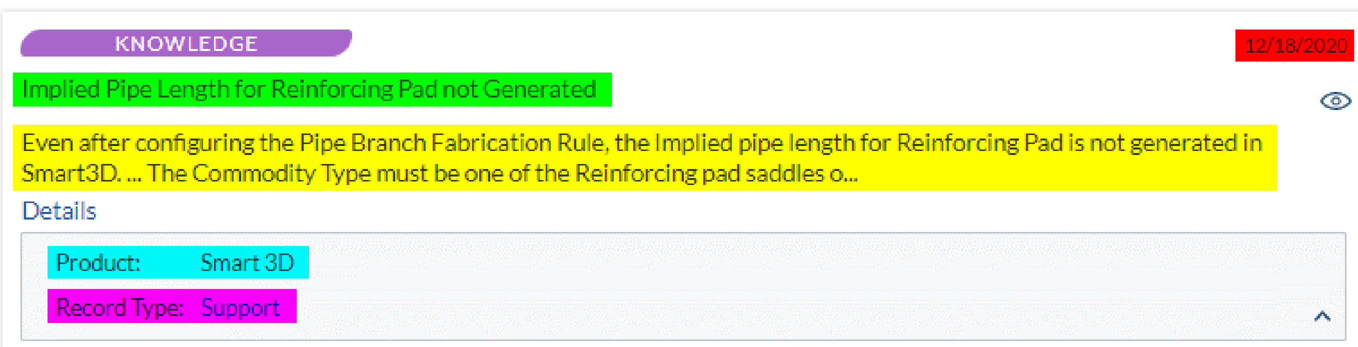


Once the search results appear, filter on **Product** and **Record Type** as needed to narrow the search results. For Knowledge Articles, **Record Type** can be either ***Support***, ***How To***, or ***FAQ***.



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**



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

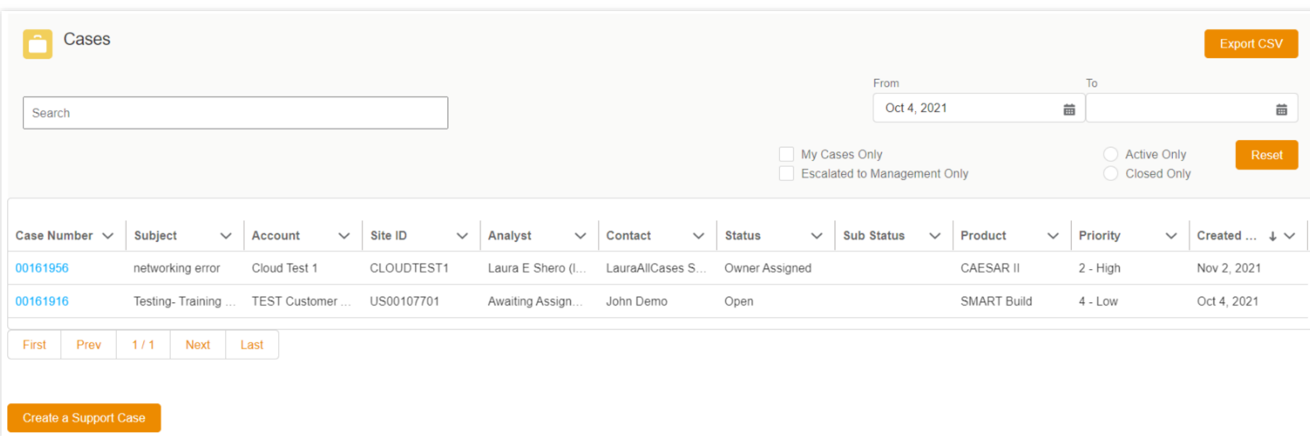
Cases

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.



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**.

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.

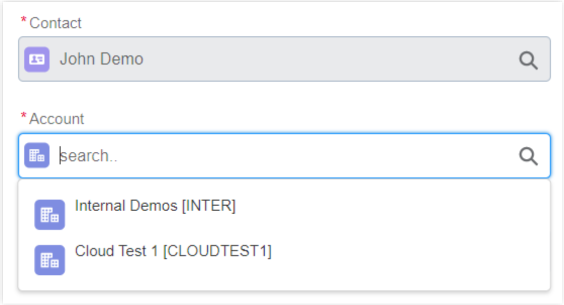
While entering information into the case, some possible solutions are recommended from the knowledge base. The suggested Knowledge Articles can be previewed or viewed in full without disrupting the creation of the case. If none of the recommended solutions relate to your case, the flow can be continued.

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.

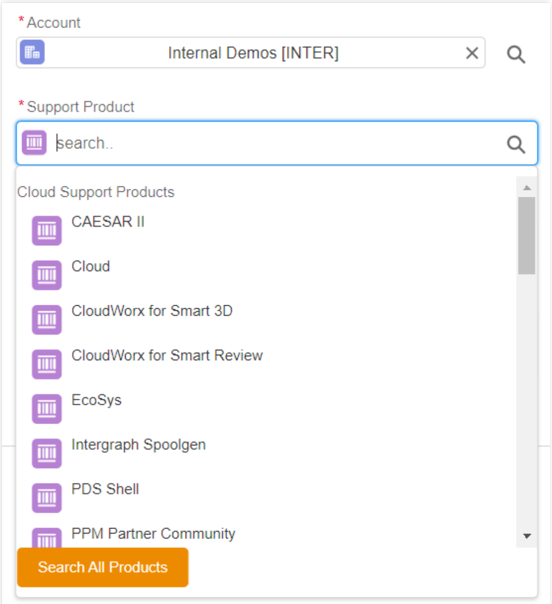
Note: The order and type of questions may be updated as needs change; however, the process generally remains the same.

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

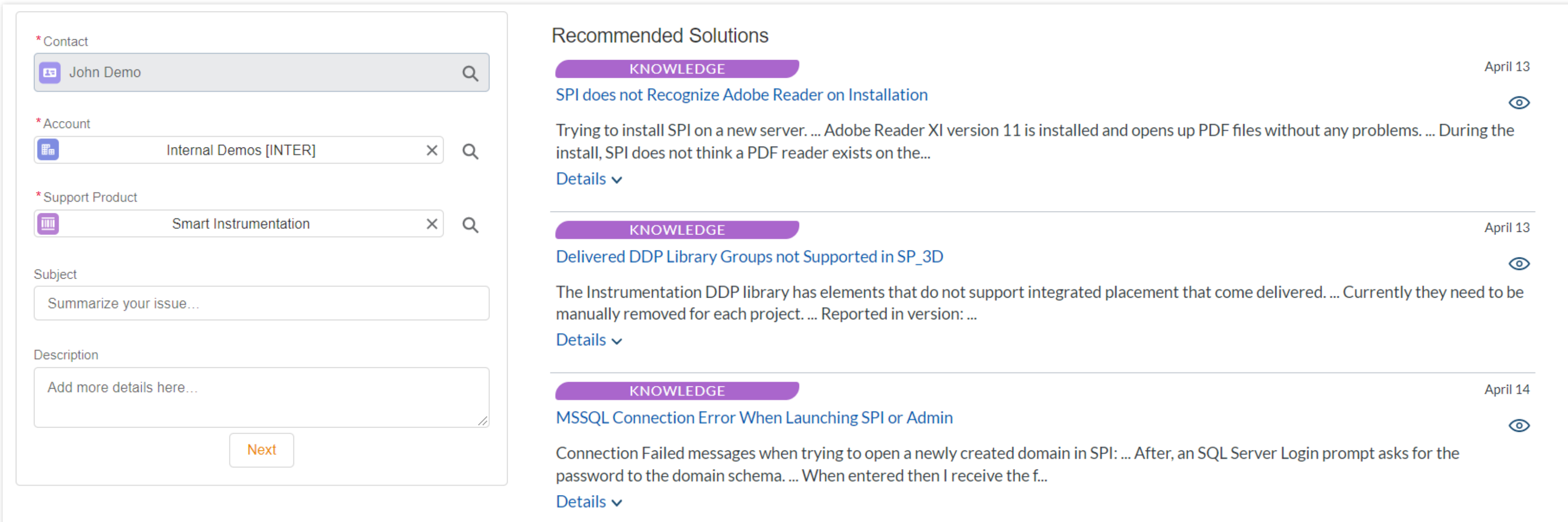
Account — Click in the field to see a list of Accounts associated to you. You can optionally type part of the Account name to narrow the list of choices. Select the Account that relates to this case.



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.

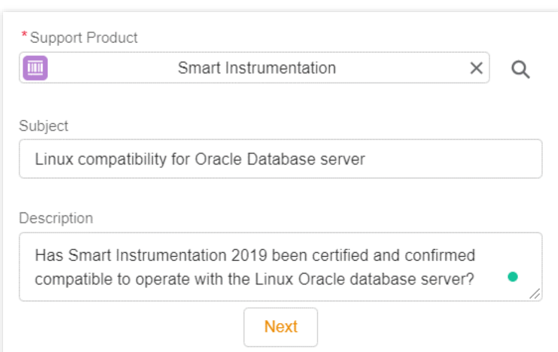


As fields are populated, the smart case creation flow continually searches Knowledge Articles and updates the **Recommended Solutions** list based on input so far.



Subject — Enter a summary of the issue or question.

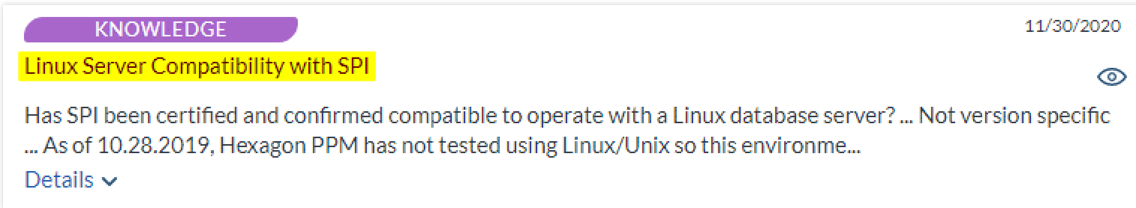
Description — Enter more details about the issue/question.



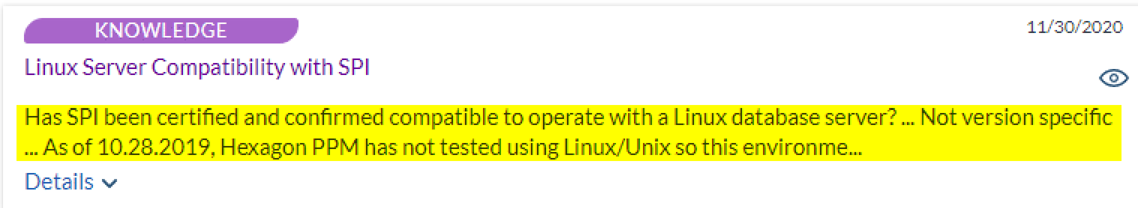
Click **Next**.

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.

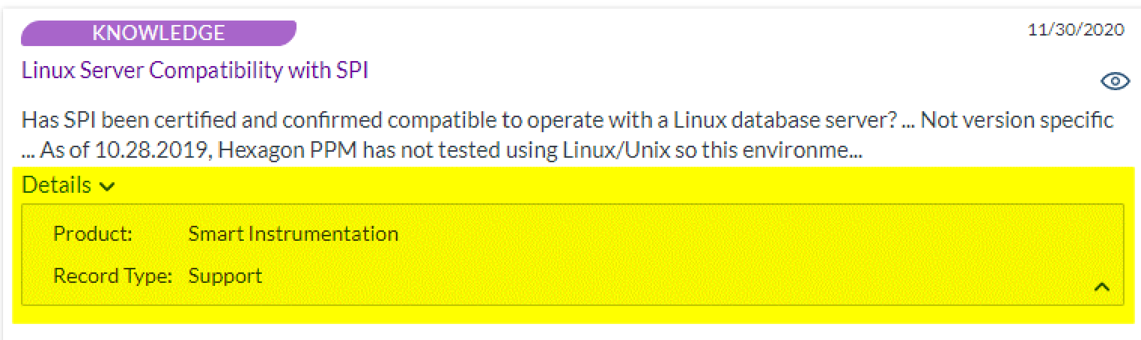
Look at the Article Title.



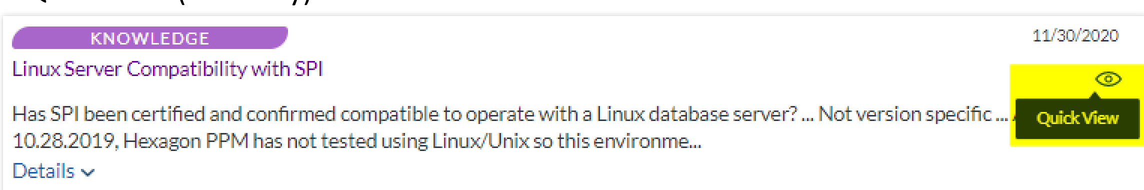
Review a snippet of the Article.



Expand to see the Article Details.



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



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

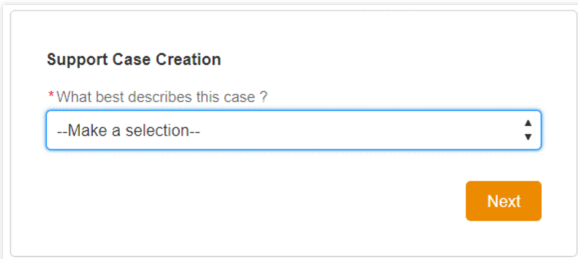
URL NAME

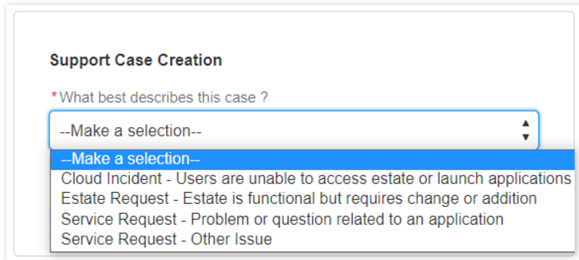
37206-linux-server-compatibility-with-spi

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.

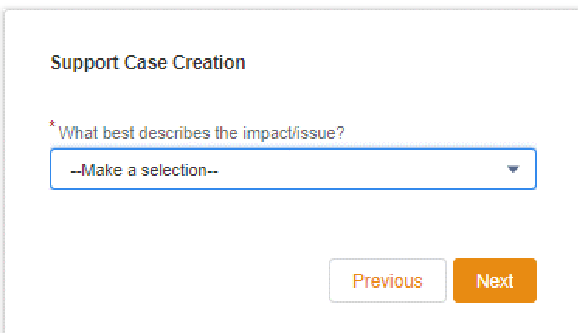
What best describes this case? — Select the response that best represents this case.

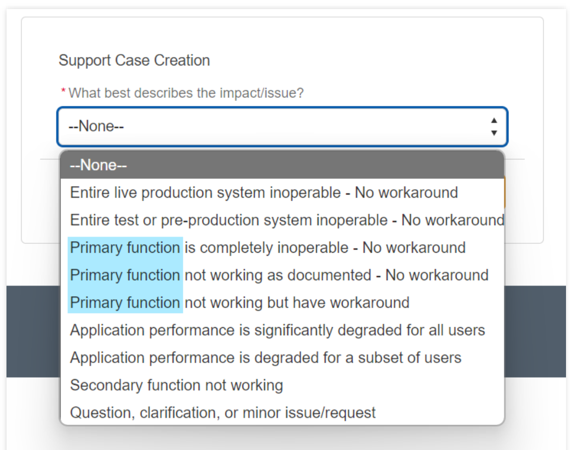




Click **Next**.

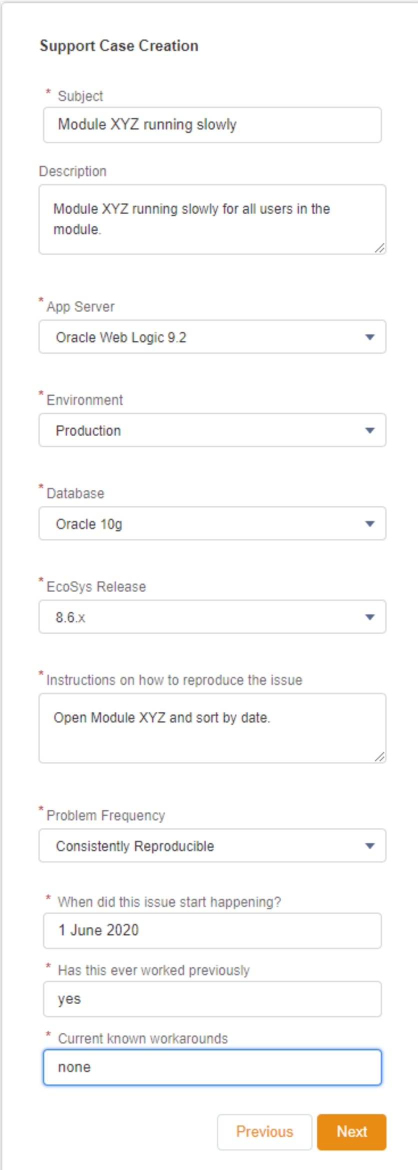
What best describes the impact/issue? — Select the response that best represents this case. **Please Note:** A "primary function" is defined as a function that is in the critical path of a deliverable.





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.

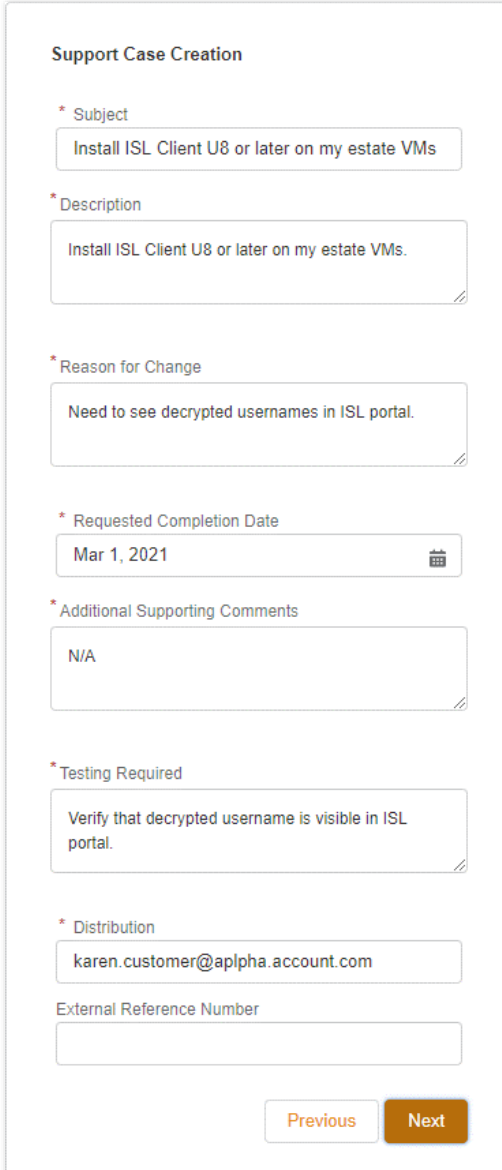
* Problem Frequency
Consistently Reproducible

* 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

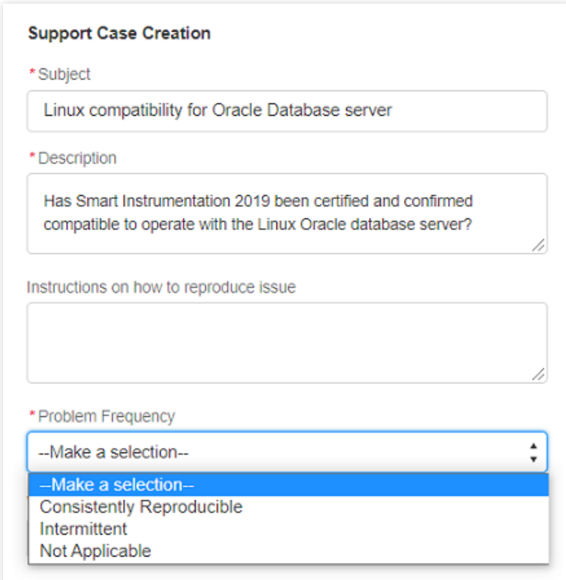
* Testing Required
Verify that decrypted username is visible in ISL portal.

* Distribution
karen.customer@aplpha.account.com

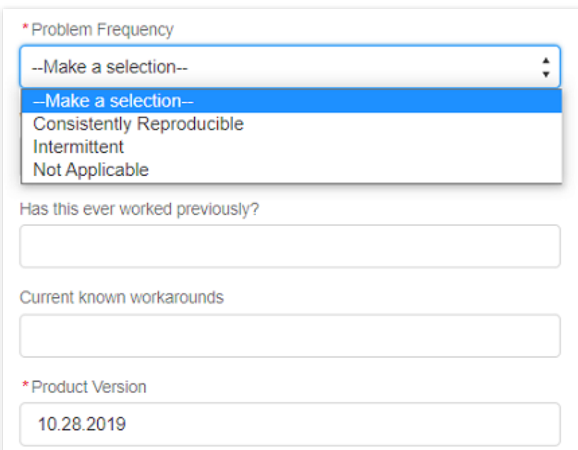
External Reference Number

Previous
Next

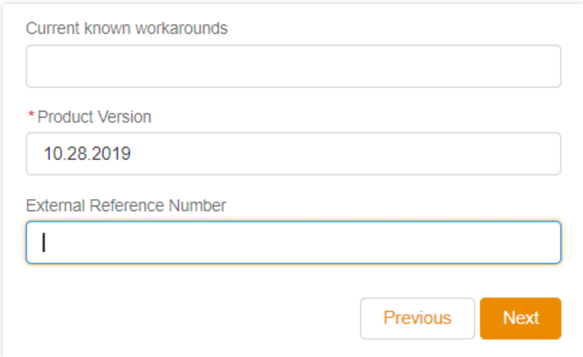
Problem Frequency — Select the frequency of the problem from the drop-down list.



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

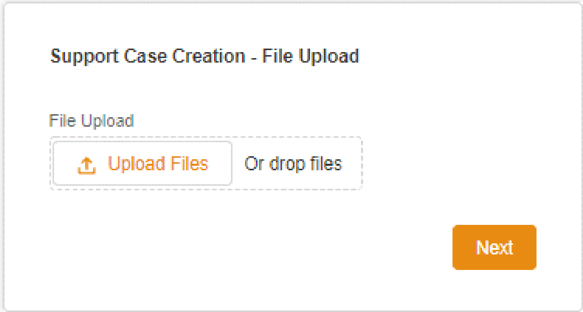


External Reference Number — This field is for your own use such as to record a reference/tracking number that is internal to your organization.

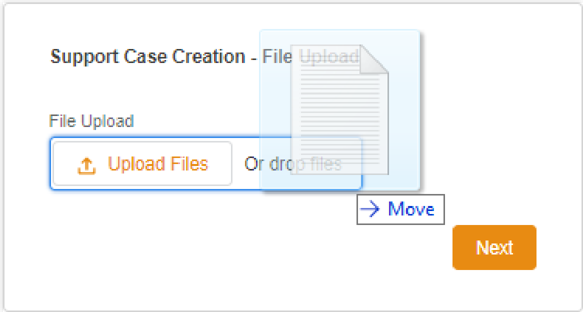


Click **Next**.

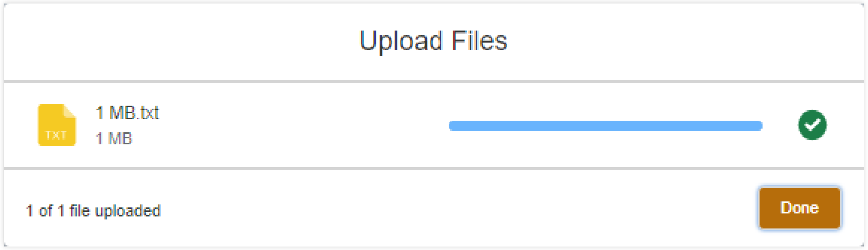
Support Case Creation - File Upload — This step is optional. If you need to attach files to this case, you can do so now or after the case is created from the case detail's view.



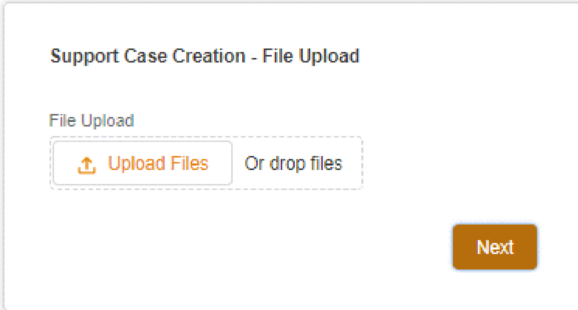
To upload files, drag up to 10 files onto the blue area shown below or click **Upload Files** to browse to one or more files to upload.



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

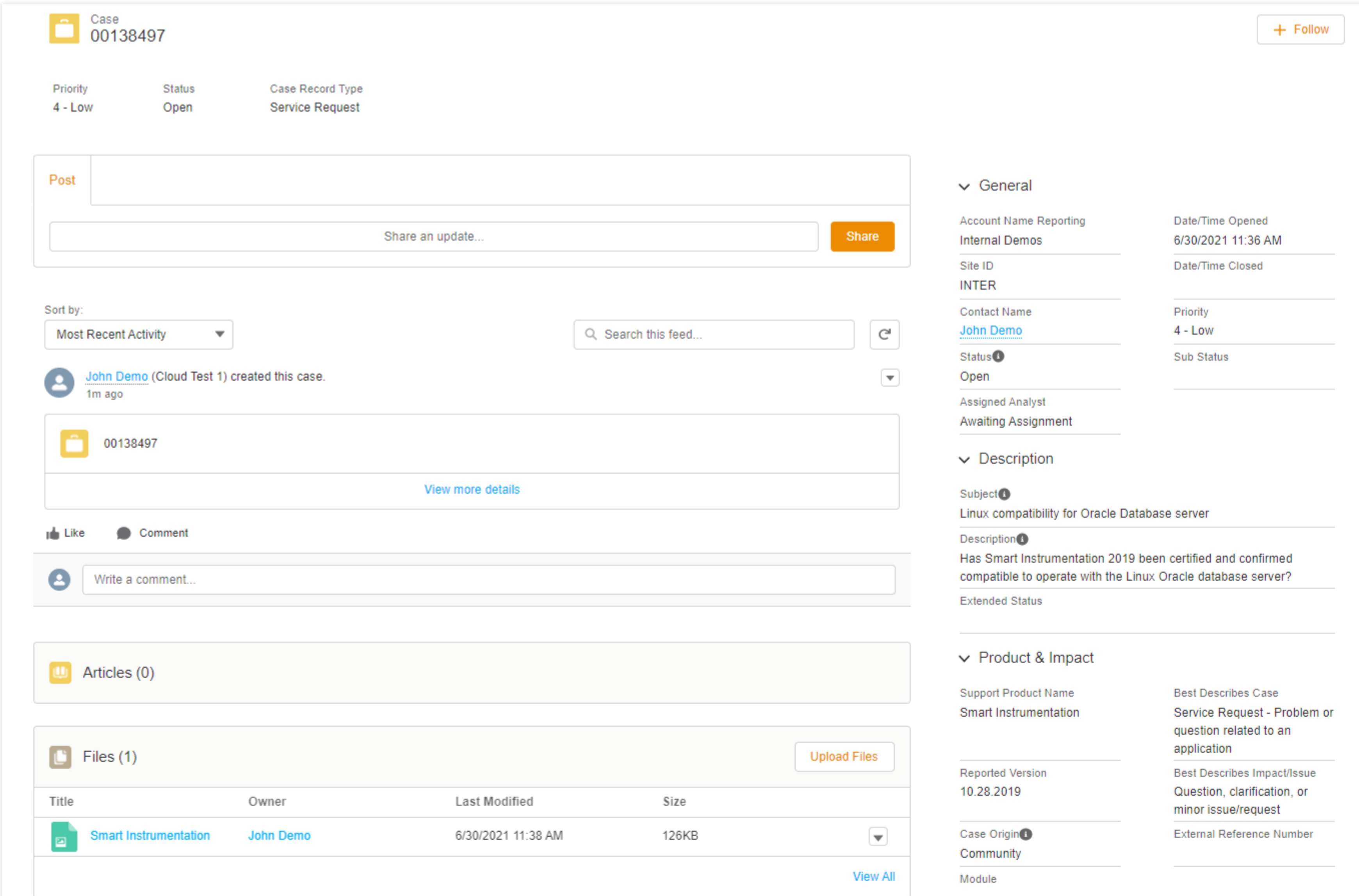


When all files have finished uploading, click **Done**. You will be taken back to the upload tool in case you need to attach more files. Note: Case attachment file size limit is 2GB.



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.



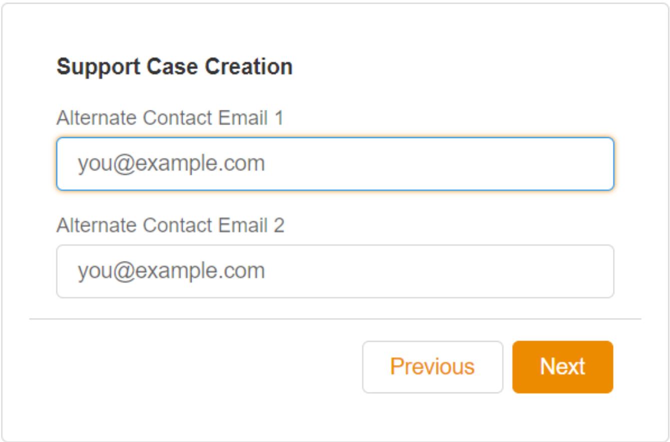
Note: Files that you attached to a case can be deleted from the above view. You cannot delete files uploaded by someone else.

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

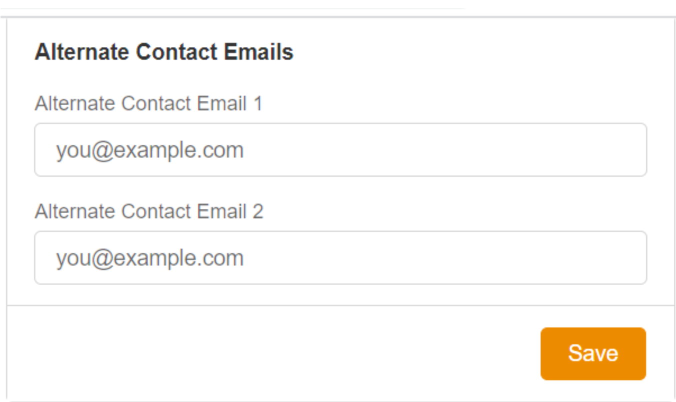
Adding Case Alternate Contacts

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

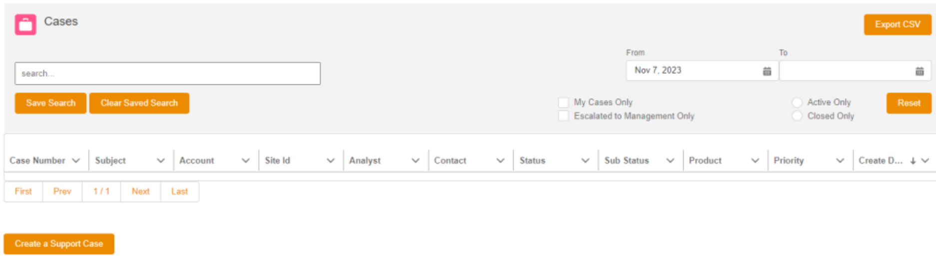


2. On an existing Case, you can update **Alternate Contact Email 1** and **Alternate Contact Email 2** in the **Alternate Contact Email** section on the Case layout.



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.



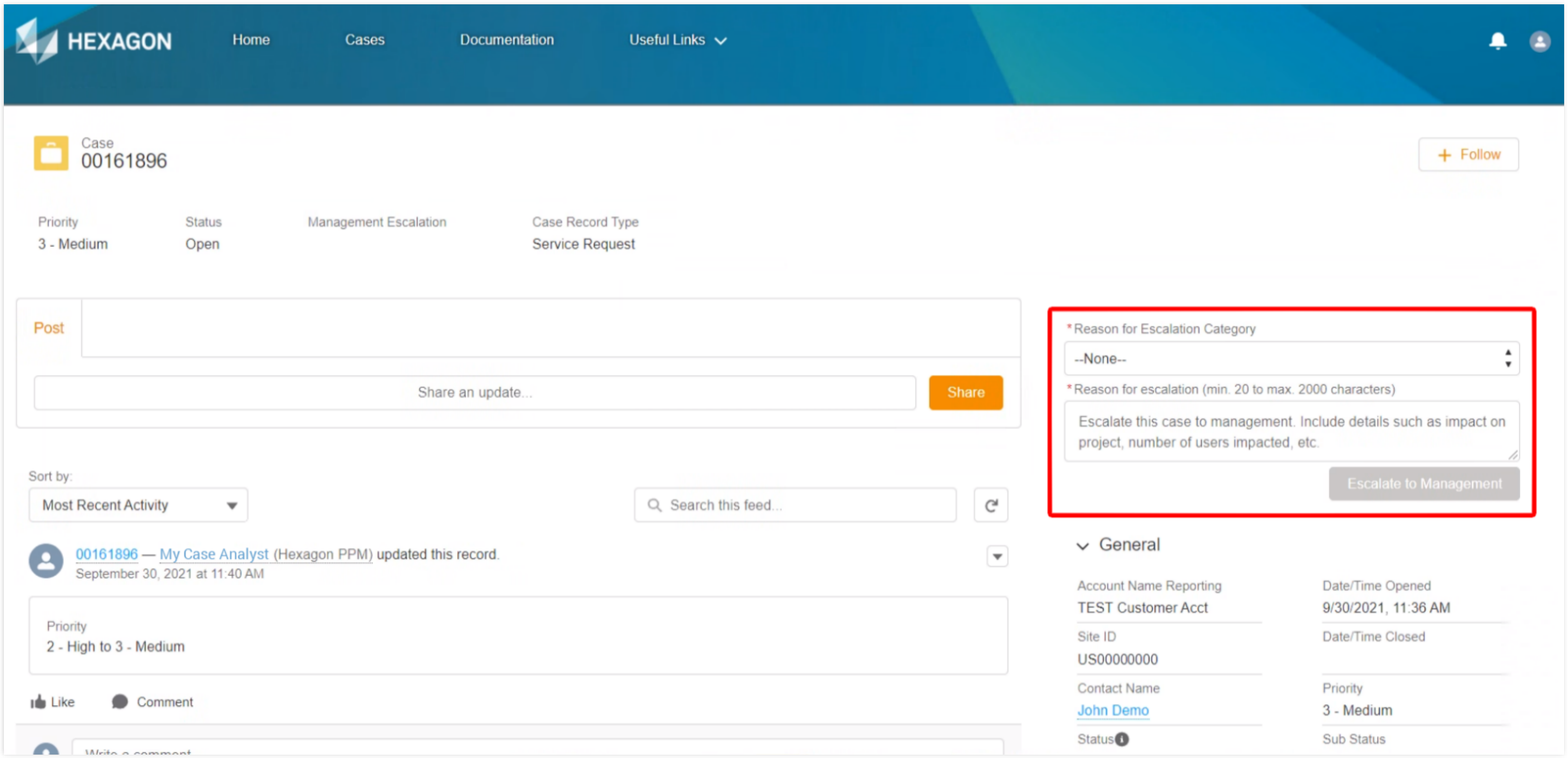
Following a Case

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.

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

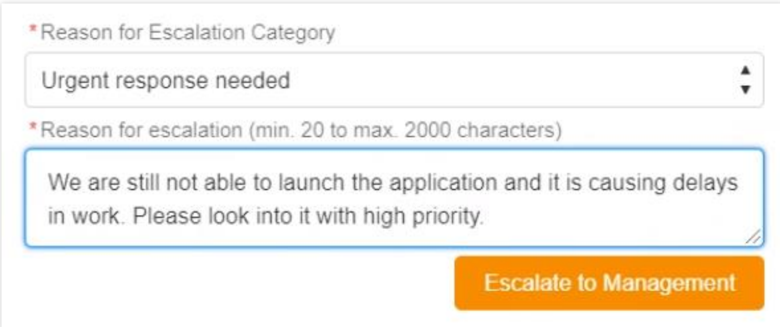
The **Escalate to Management** feature provides the ability to bring a Case to the attention of Support management for review and assistance. While viewing the details of a Case that meets the criteria for escalation, the Case can be escalated using the **Escalate to Management** section.



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

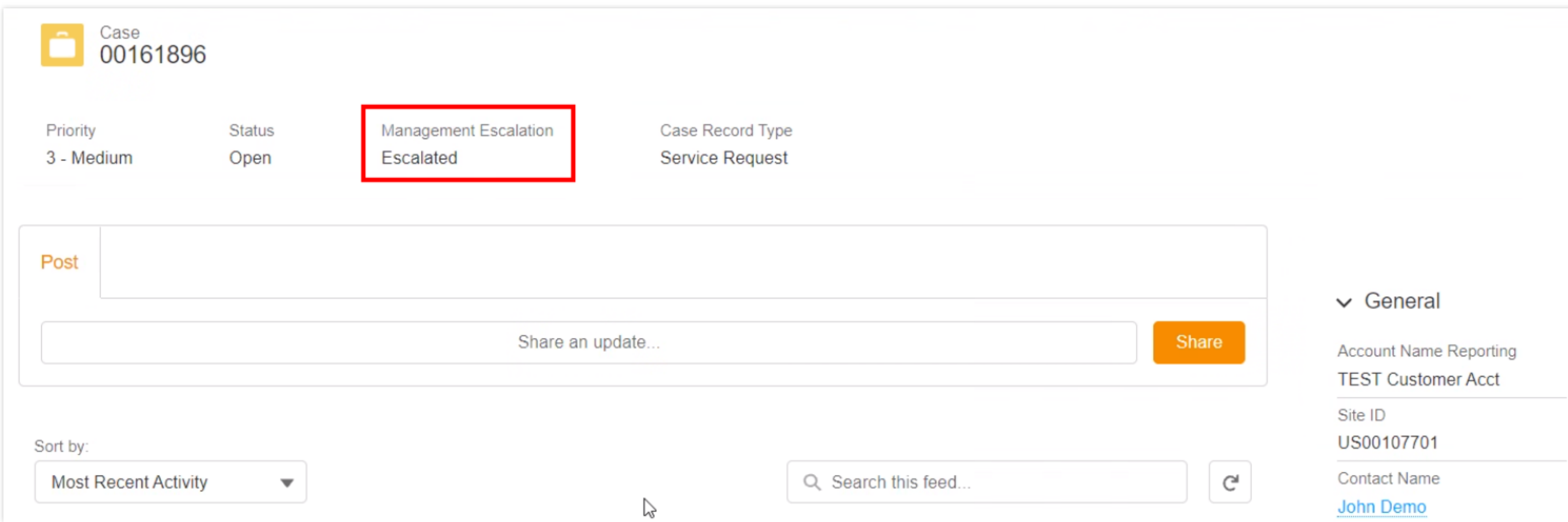
To escalate a Case to Support management, select a **Reason for Escalation Category** and provide justification in the **Reason for Escalation** text box as shown below:



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

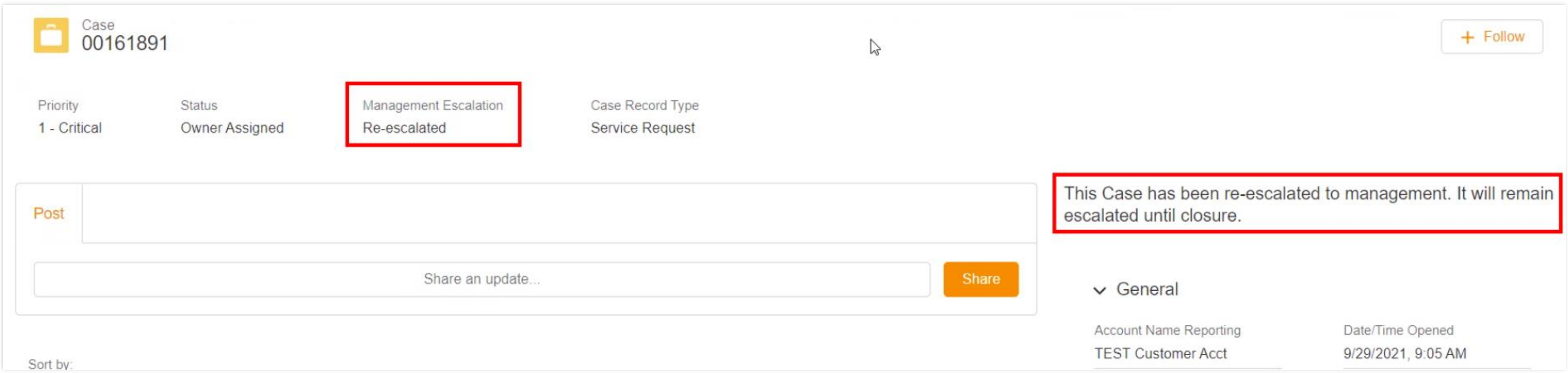
This case is escalated to management. You will be contacted as soon as possible.

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.

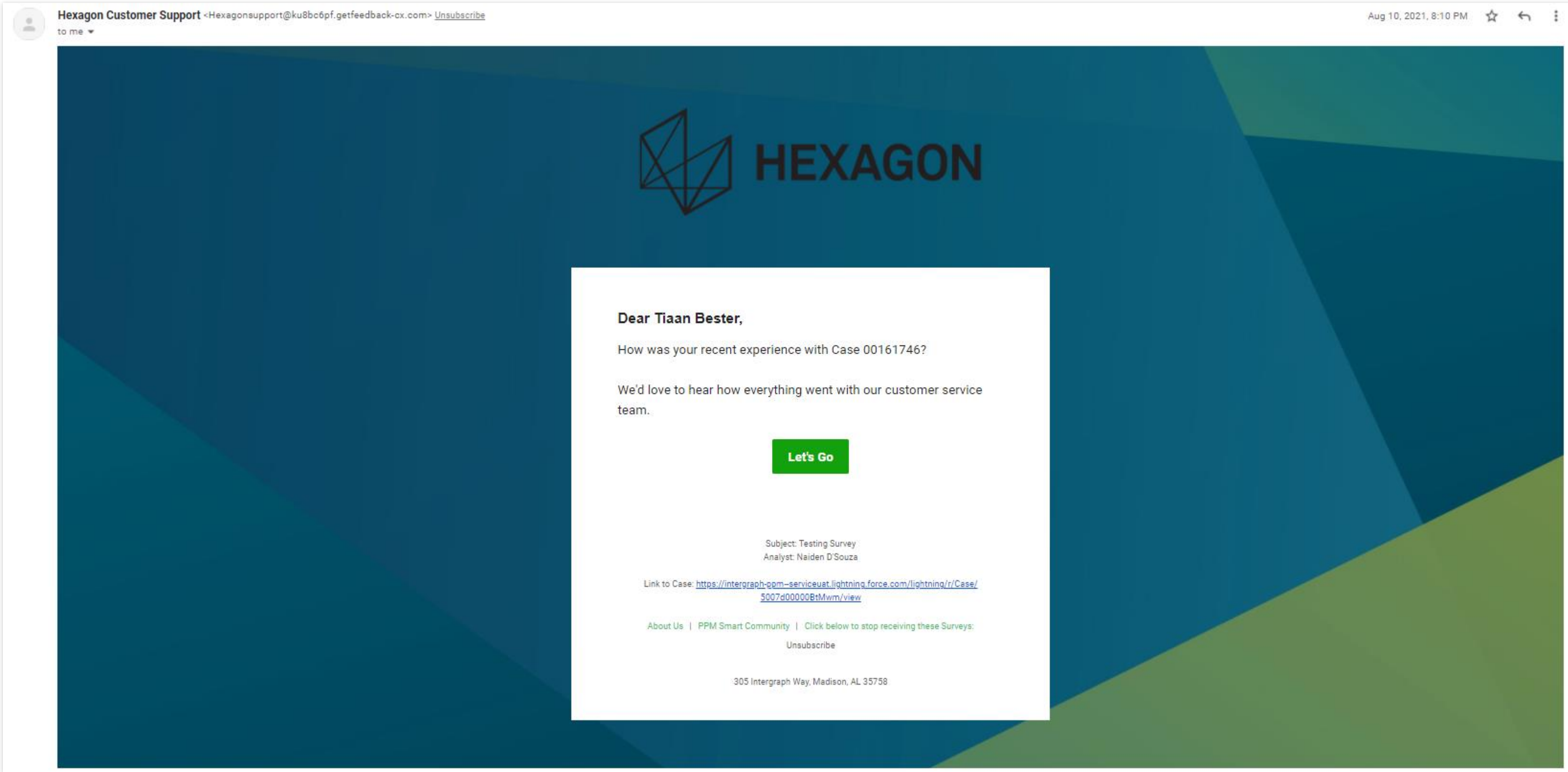
If the Case is escalated a second time, the Case will be handled similarly. **Management Escalation** will show ***Re-escalated***. A confirmation message will appear on the screen and will remain as a reminder that the Case cannot be escalated again. A re-escalated Case is not de-escalated.



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 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.

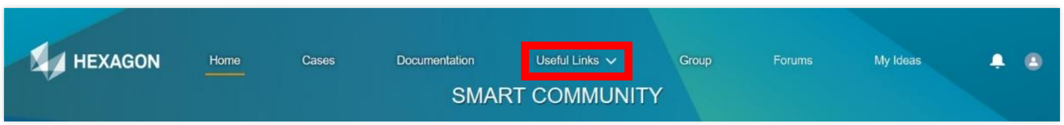
Documentation

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.



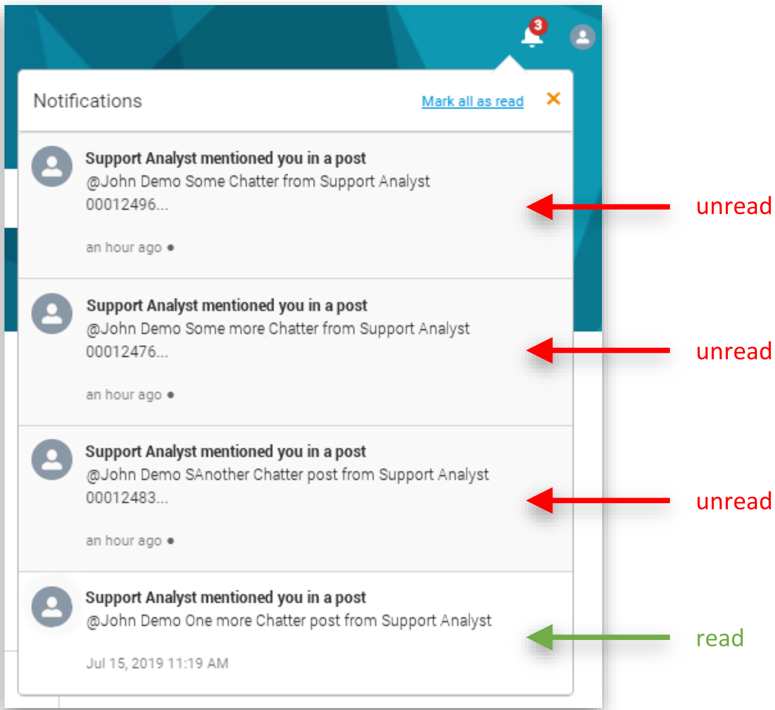
Useful Links targets open in a new browser tab.

- **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.

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.

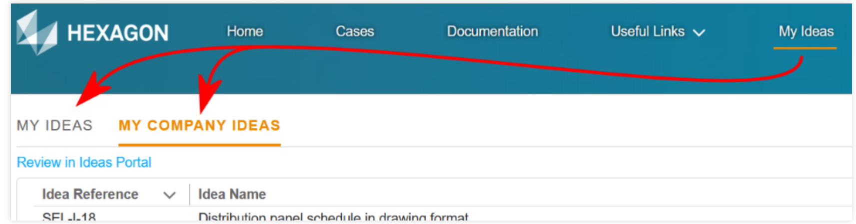
Ideas are not linked to Support Cases, because Ideas and Support Cases serve different purposes. If a Support Case is determined to be a request for a new feature, the Case will be closed, and the support analyst will recommend submitting the enhancement request on the Ideas portal.

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

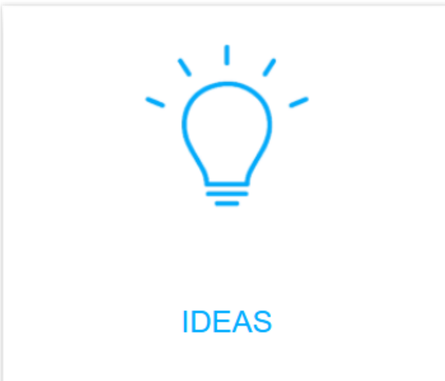
option at the top of the page. Then you can choose from two lists views:

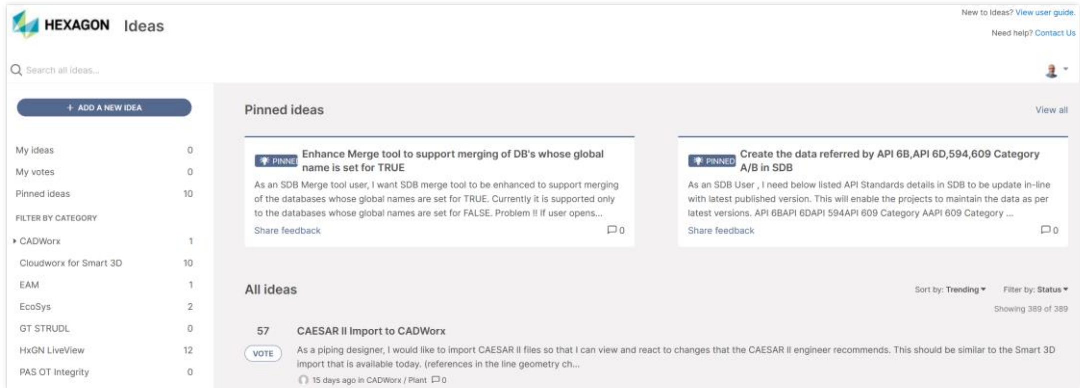
- **MY IDEAS** — Lists Ideas that you have submitted.
- **MY COMPANY IDEAS** — Lists Ideas that users from your company have submitted.



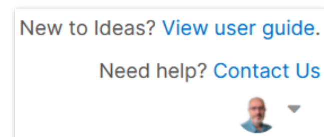
Note the **Idea Reference** of the Idea you are interested in reviewing, then click **Review in Ideas Portal**. This will take you to the Ideas portal where you can find that Idea by its **Idea Reference**.

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



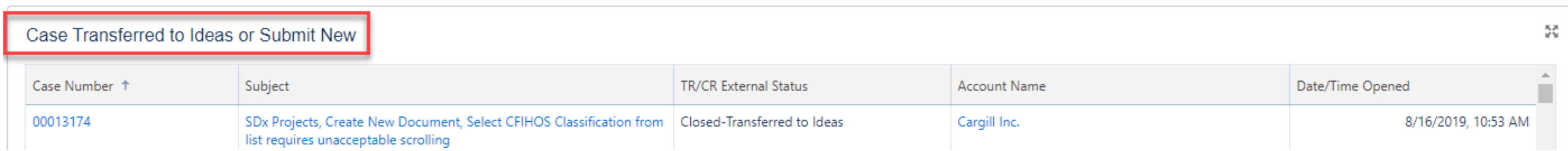


Once in the Ideas portal, you will see two links at the top-right corner of the page. These links provide access to the Ideas portal user guide as well as a method to contact the Ideas team if you have questions about using the portal.



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**.**



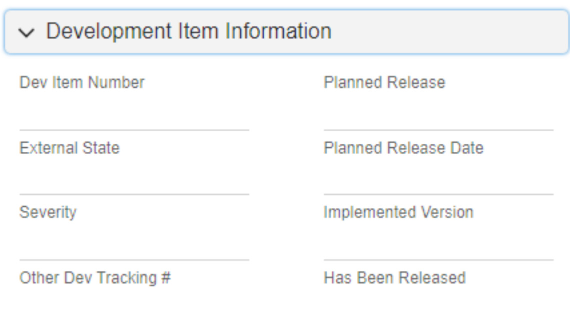
Case Transferred to Ideas or Submit New

Case Number	Subject	TR/CR External Status	Account Name	Date/Time Opened
00013174	SDx Projects, Create New Document, Select CFIHOS 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.



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

- **External State** – calculated filed 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

Support Forums

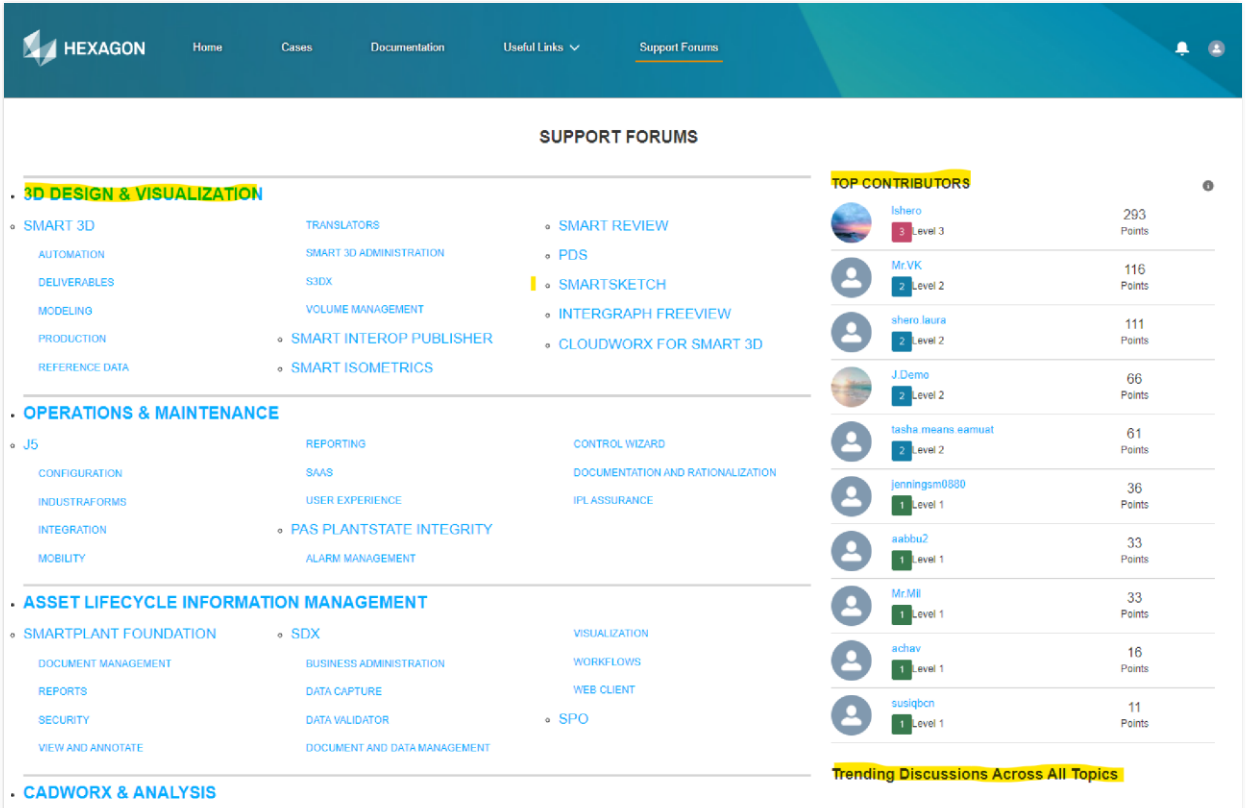
Hexagon's Support Forums is a peer-to-peer discussion board that allows Hexagon Asset Life Cycle Intelligence division customers to post questions, engage in conversation, share knowledge, and suggest solutions to posted questions. The purpose of Support Forums is to allow Smart Community users to share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

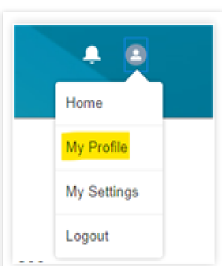
On the landing page, notice the below three main sections:

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



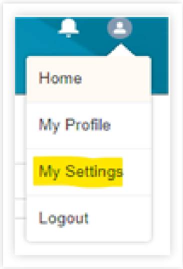
User Profile in Forums

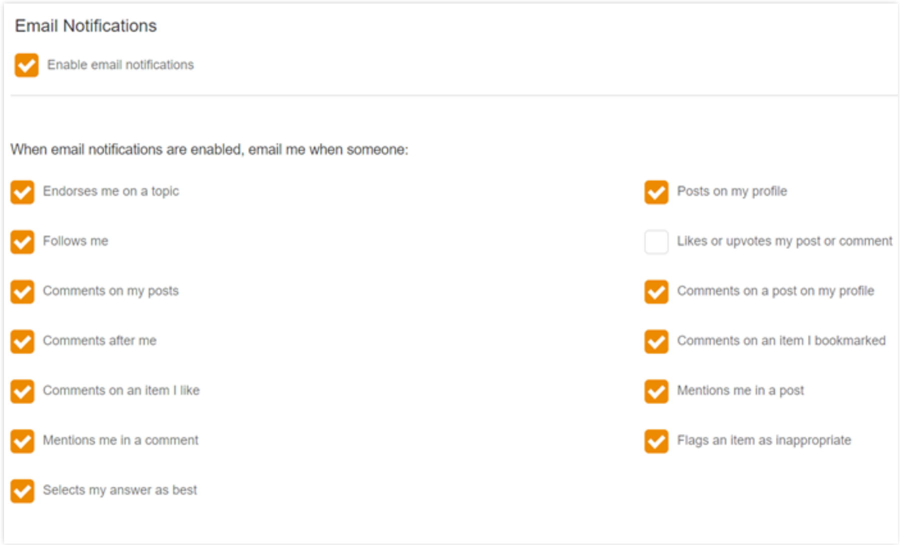
From the **Profile** icon, select **My Profile**. Here, you can change your nickname on the Support Forums, including optionally uploading a profile picture that will be visible in **Support Forums** discussions.



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.

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

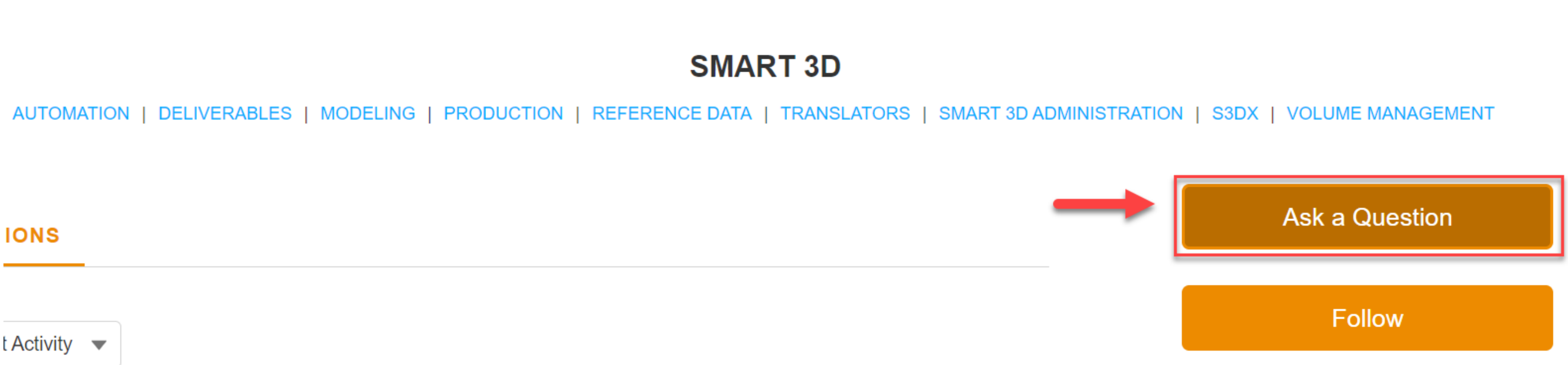
Navigate to your desired topic and view posts to see if your question has been asked. Once you have clicked on the desired topic, review all the questions/posts that relate to this topic.

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

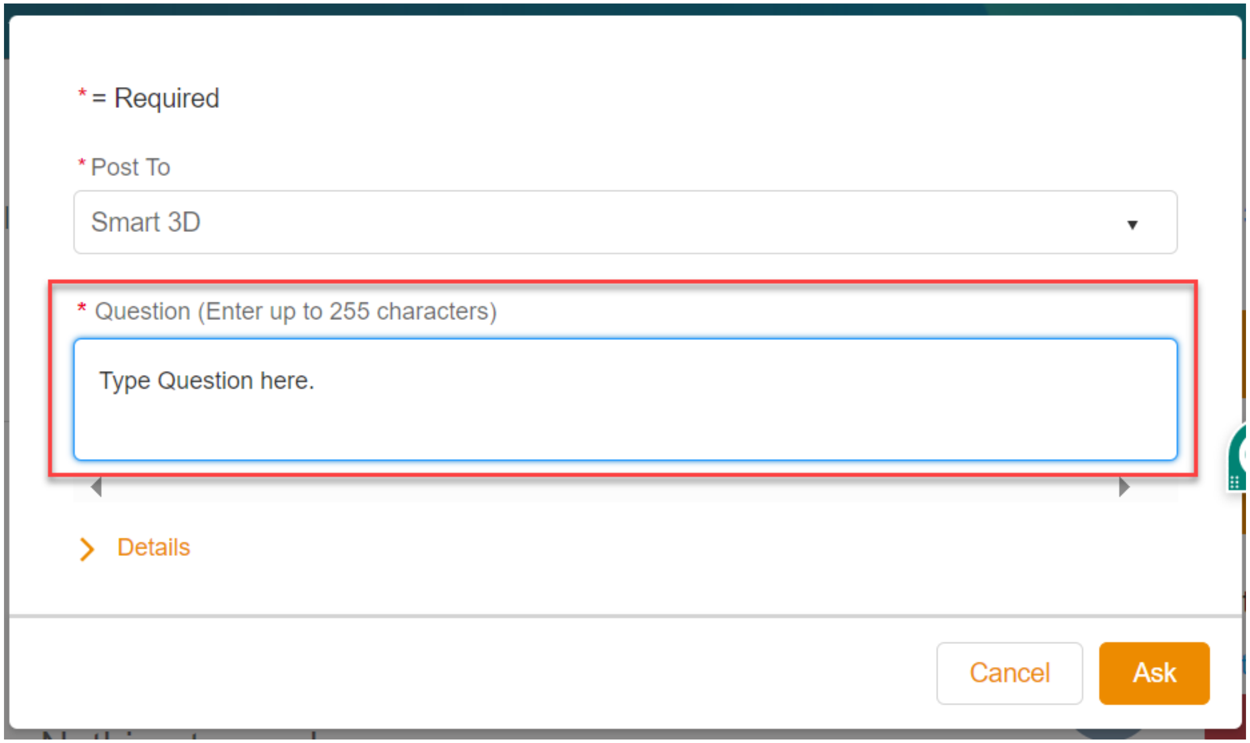
- The **Ask a Question** button will appear on the top right of the screen after clicking on a topic.
- The following is required when you select **Ask a Question**:
    - **Post To** — Select the desired Forum on which to post a question.
    - **Question (Enter up to 255 Characters)** — Enter a summary 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**.



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.



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

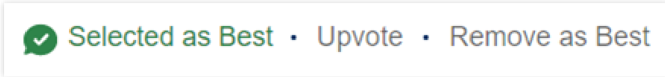
Selecting the Best Answer

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**.



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.

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.

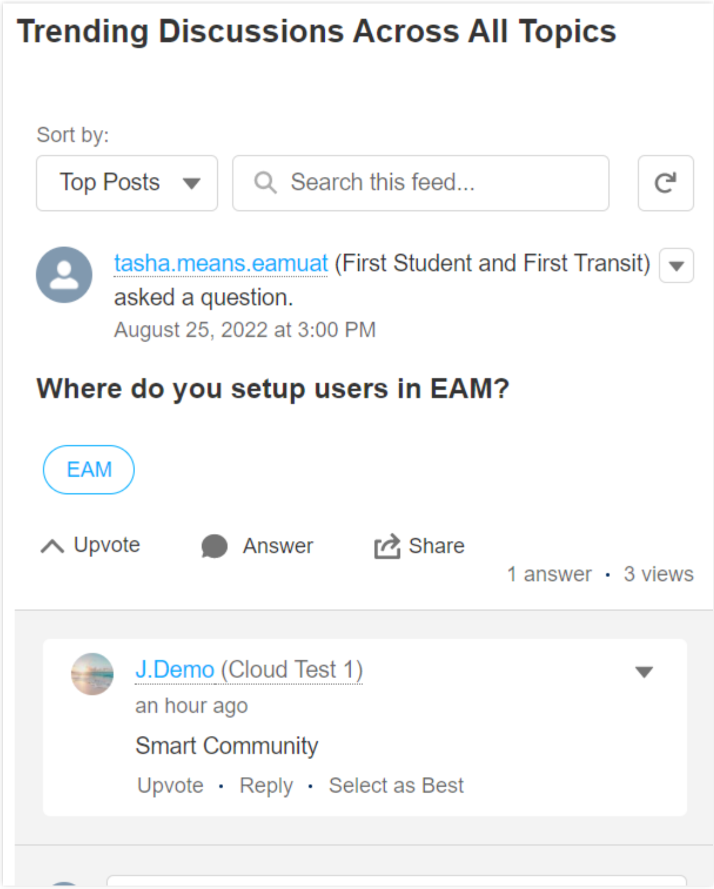
Top Contributors Leader board

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.

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***.

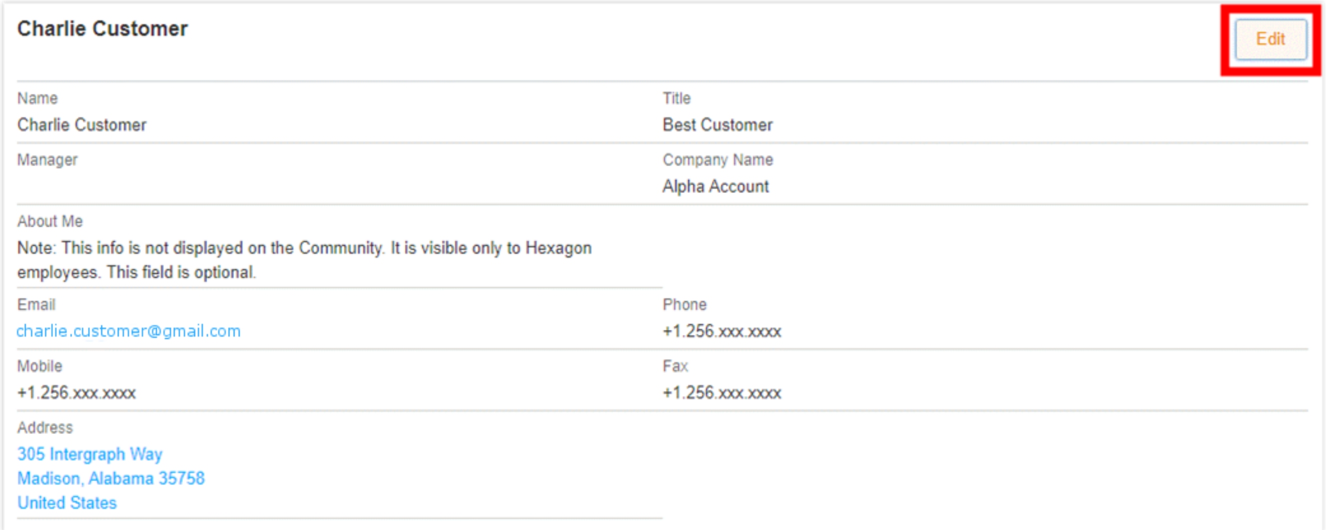


Scroll down this feed to load more discussions.

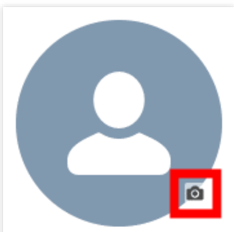
User Profile

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.



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



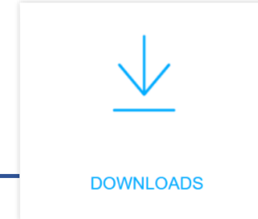
My Settings

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.

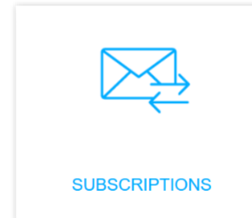
- Email Notifications can be enabled in **My Settings**. On the **My Settings** page, scroll until you see **Email Notifications**

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.

Support Notification Subscriptions



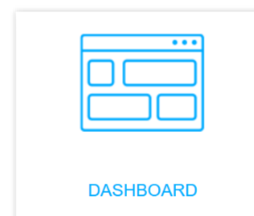
Solution Support occasionally sends out notification to subscribers about their products. To receive support notifications, you must opt in and subscribe to the products of interest to you. Below are the types of support notifications that you can subscribe to:

- 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

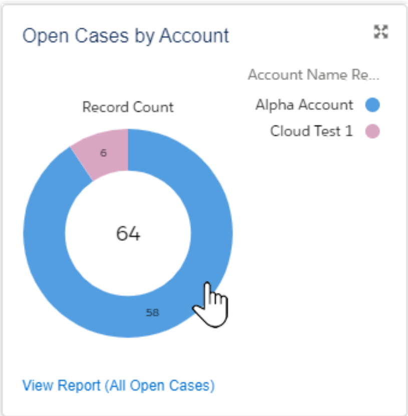


To see a dashboard of your cases, click on the **Dashboard** tile on the **Home** page. Dashboards will provide information and will serve as a visual representation of your support cases. Your cases are graphed and grouped by:

- Account
- Length of time open

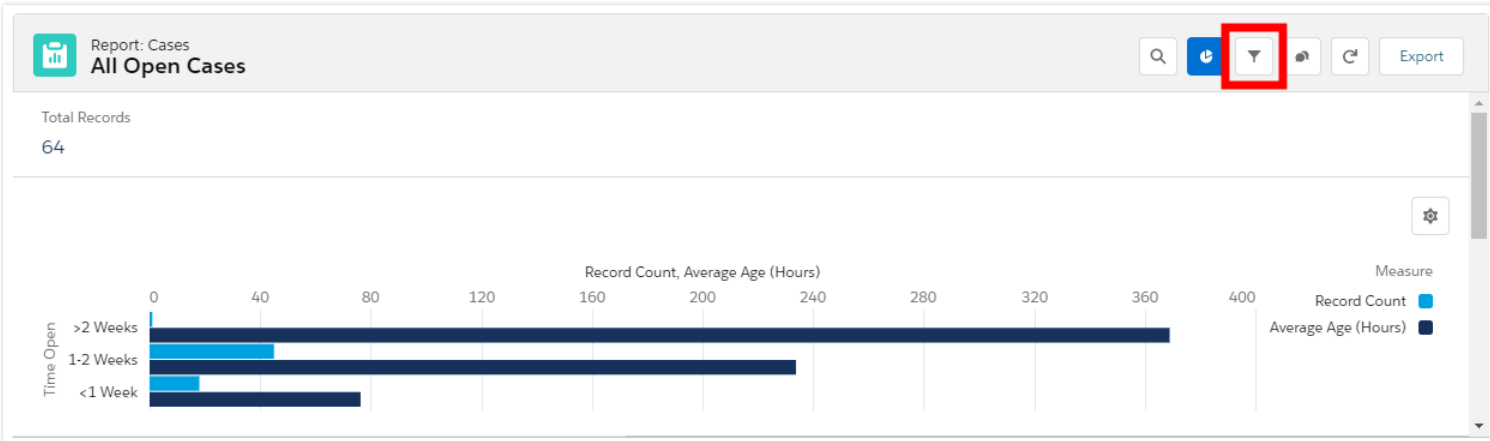
- Length of time to be resolved.
- Product
- Status
- Dev Item association
- etc.

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.

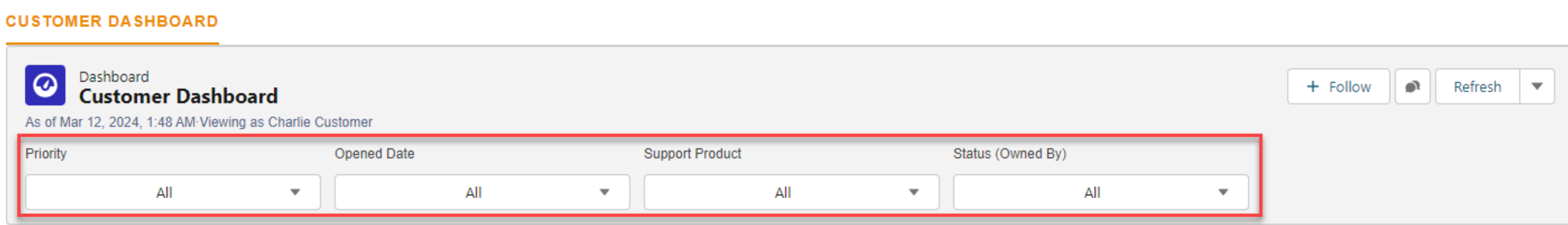
At the bottom of any chart, click **View Report** to see the tabulated report that is the source of the chart. To see the filter criteria that were used to capture the report's data, click the **Filters** button ( ) at the top-right corner of the report.



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.



The filters available **Customer Dashboard**:

- **Priority** — The choices for case Priorities are **1 - Critical** and **2 - High** grouped together <u>or</u> **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.

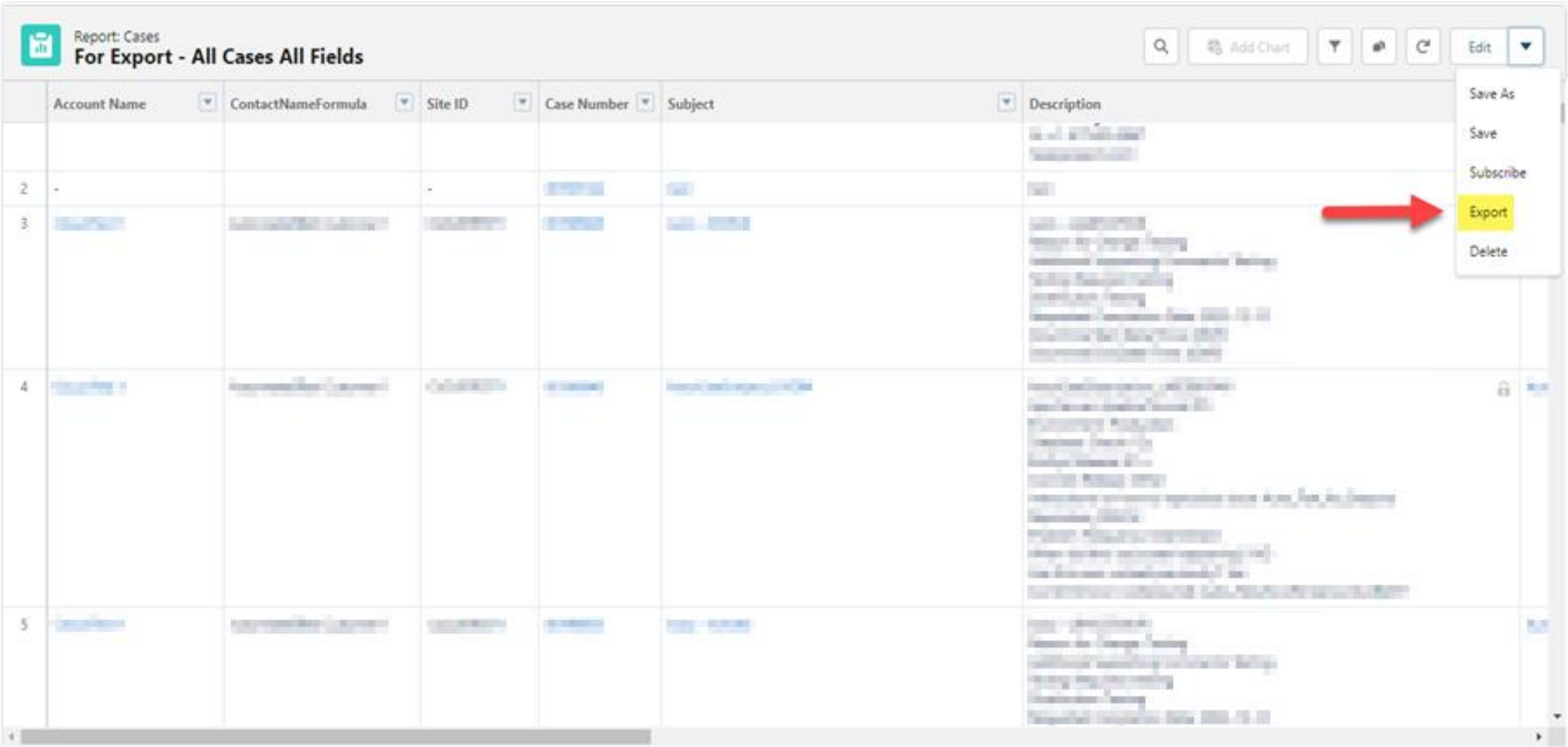
Note: Like with all other charts/reports in this Dashboard, this report is based on the three filters at the top of the dashboard.


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

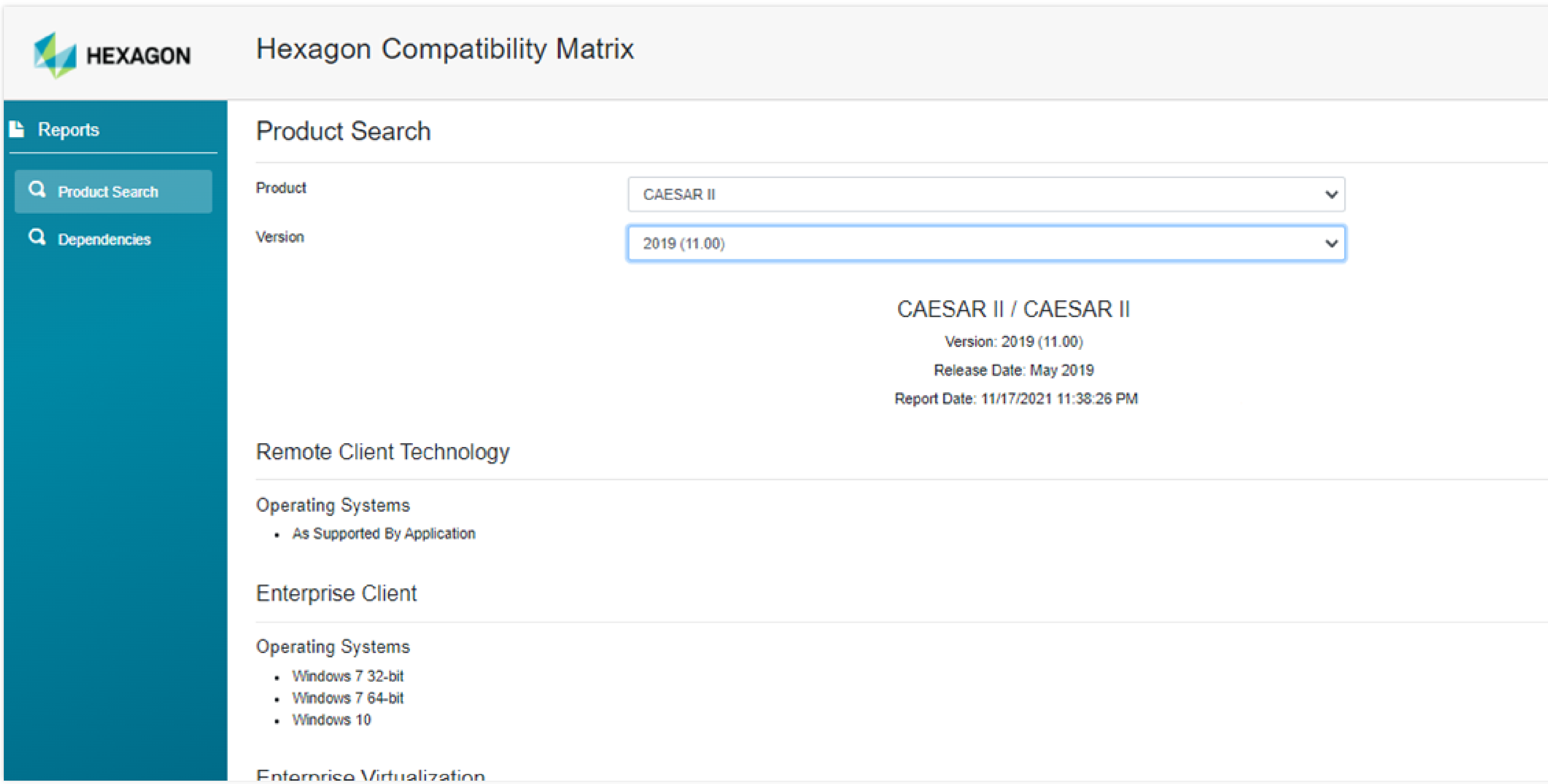
View Report (For Export - All Cases All Fields)

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
Add Chart
Edit
Account Name
ContactNameFormula
Site ID
Case Number
Subject
Description
Save As
Save
Subscribe
Export
Delete

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.



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

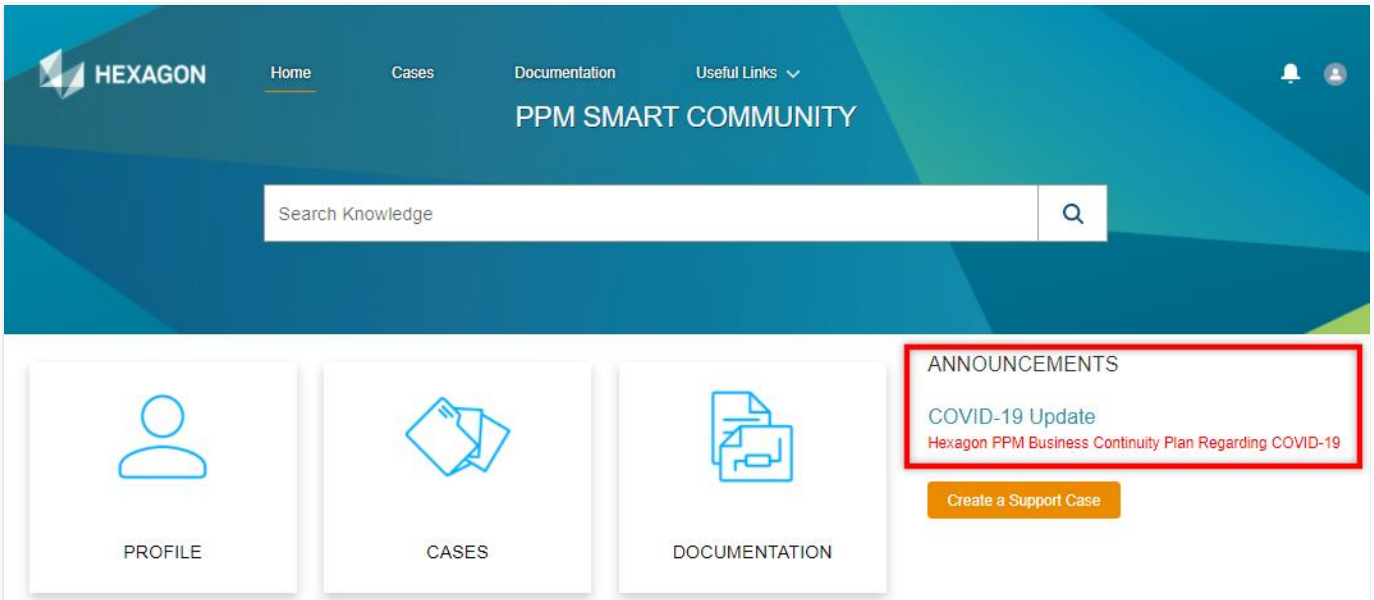
Product Releases Schedule

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.

Announcements

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



Methods of Updating a Case

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.

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.

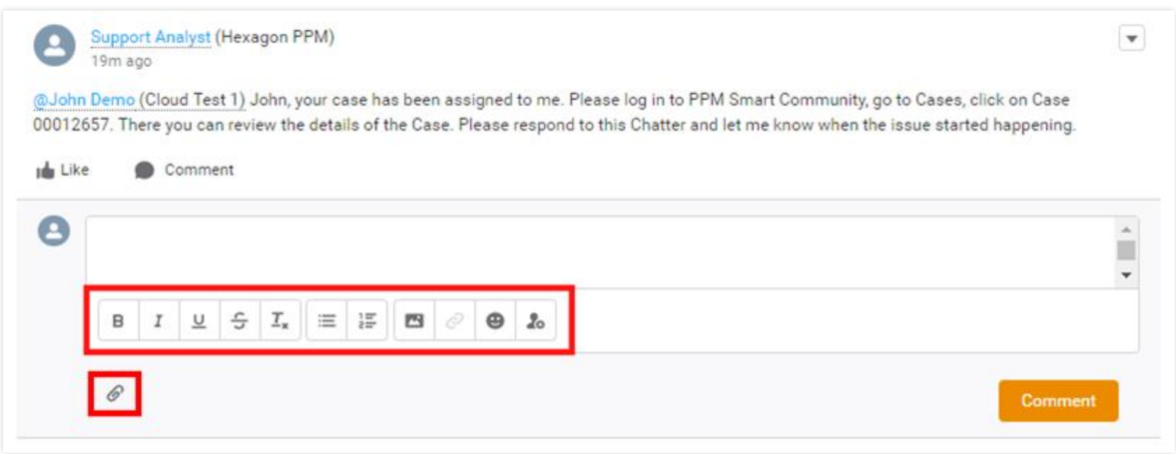
Since Chatter is started from a case, it is always saved on the case for you, others at your company, and Hexagon support analysts to have access to view.

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

Rich Formatting

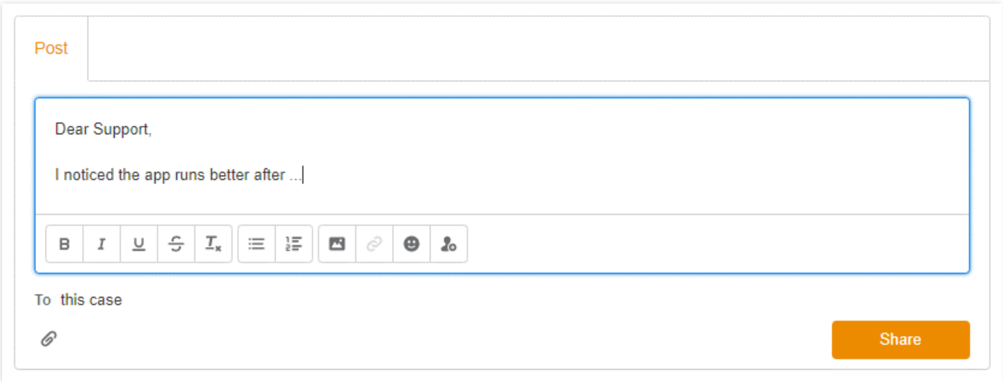
Chatter can include basic HTML text formatting, hyperlinks, attachments, and inline images such as screenshots.



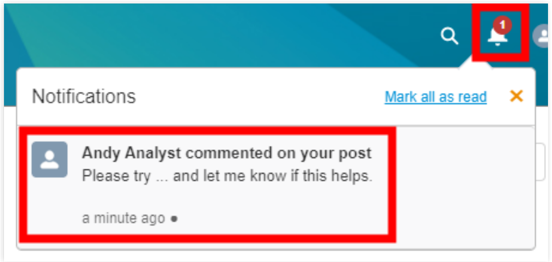
To format text, select text to be formatted in **bold**, *italics*, underline, etc., and then use the appropriate formatting control. To insert an inline image, use the **Image** tool ( ). To attach a file, use the **Attachment** tool ( ).

Examples of Using Chatter

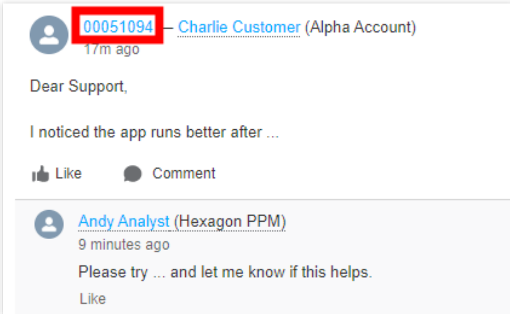
After you create a case on **Smart Community**, you can begin communicating with the support analyst who will be assigned to your case, even prior to assignment. For example, you can provide more information than you originally included in your case submission, or you can ask further questions.



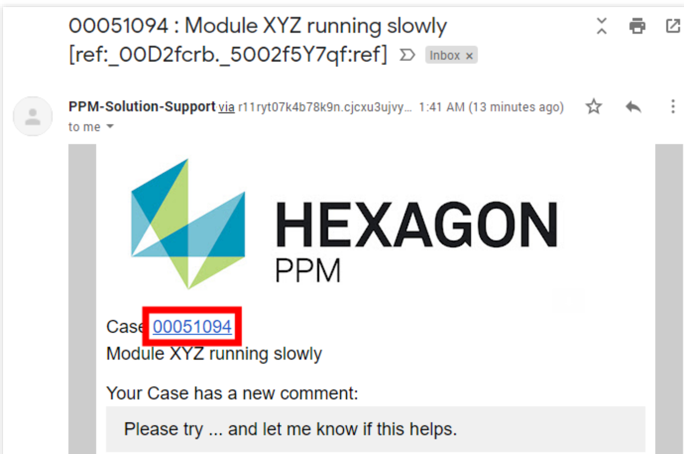
The support analyst who is assigned to your case will be notified of the incoming Chatter on the case. When the analyst replies to your Chatter, you will receive a notification of a new comment. Click on the bell icon to see a preview of the Chatter. Click on the preview to go to the Chatter post on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



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



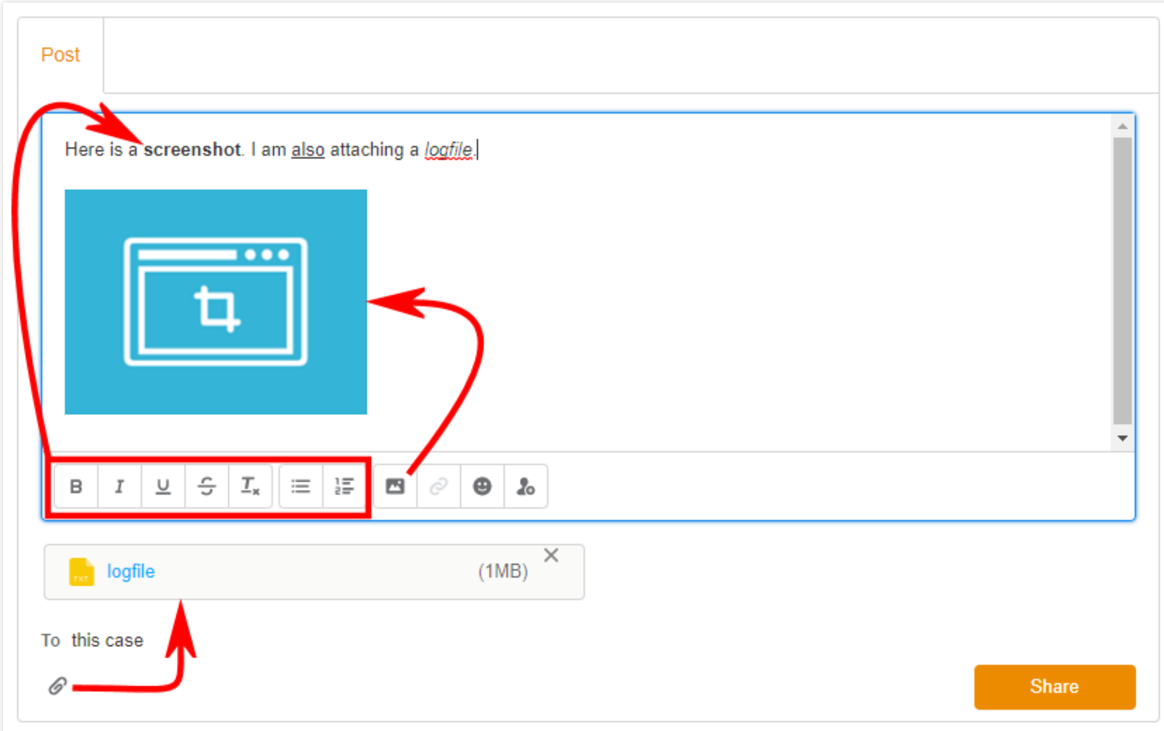
You will also receive an email copy of the Chatter. The email includes a link that takes you straight to the case. This dual-notification method helps reduce the chance of the recipient missing a Chatter post. The email copy also keeps the user from having to maintain a constant **Smart Community** session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



You can respond to the Chatter from the post while logged in to the Community <u>or</u> 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*, <u>underline</u>, 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**.

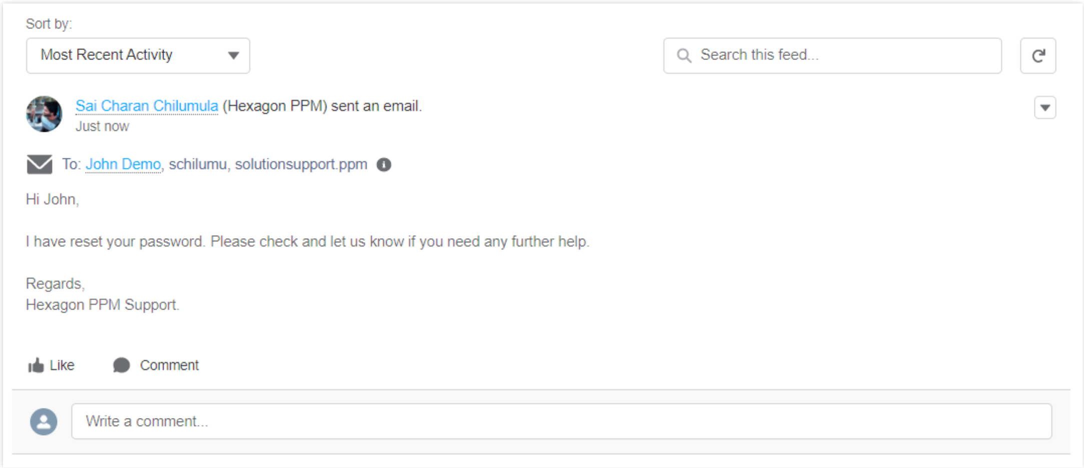


Email

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 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 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 Febuary 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 Searching in Support Forums section.
19 August 2024	3.25	Adding Waiting on Customer section
1 December 2023	3.24	Added Adding Case Alternate Contacts section.
6 October 2023	3.23	Added Follow a Case section
4 April 2023	3.22	Updated Development Items section with definitions.
9 February 2023	3.21	Added Development Items section
1 December 2022	3.20	Updated Support Browsers Section.
14 November 2022	3.19	Updated Screenshots/Added new section under Ideas: View Closed CRs Transferred to Ideas
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 **Support Forums** 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 Ideas section.
18 January 2022	3.12	Updated screenshot to show the location of the **ALI University** tile on **Home** page and a brief description of its purpose.
15 December 2021	3.11	Updated **Escalating a Case to Management** section.
17 November 2021	3.10	Updated **Licensing Portal** access information and Product Compatibility sections.
03 November 2021	3.09	Updated Viewing and Searching Existing Cases section.
22 October 2021	3.08	Added **Escalating a Case to Management** section.
06 October 2021	3.07	Updated Unsubscribe or Subscribe from receiving Survey emails section.
13 September 2021	3.06	Updated the Support Notification Subscription section.
13 September 2021	3.05	Updated **My Settings** section.
30 August 2021	3.04	Removed Internet Explorer from Supported browsers.
24 August 2021	3.03	Added Submitting a Satisfaction Survey section
6 July 2021	3.02	Added the Email section and updated the Submitting a New Support Case flow section.
23 June 2021	3.01	Added **My Settings** section.
23 January 2021	3.00	Added Knowledge information and updates to case creation flow based on the 25 January 2021 update to **Smart Community**.
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.