



# **FirstLine**

## Quick Start Guide

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## Quick Start Guide To Using FirstLine

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## Quick Start Guide To Using FirstLine

### To access FirstLine:

Point your Internet browser to <http://support.timpotech.com/>

### To log on:

Enter your user ID and password. This is the user ID and password that you received from TimpTech when you registered with FirstLine. Then click the Login button.

If you have not registered, refer to the instructions below for registering with FirstLine.

A screenshot of the FirstLine Support login interface. At the top, there is a blue header bar with the TimpTech logo on the left, "Support: Login" in the center, and "Not logged in." on the right. Below the header, the word "FirstLine" is prominently displayed in a large, blue, serif font, with "Support" in a smaller, blue, sans-serif font underneath. The main content area features a login form with a blue header that says "Login" and "RT 2.0.15 for TimpTech". The form contains two input fields: "Username:" and "Password:". A "Login" button is positioned to the right of the password field. At the bottom of the page, there is a small copyright notice: "RT is © Copyright 1996-2002 Jesse Vincent - jesse@bestpractical.com - It is distributed under Version 2 of the GNU General Public License."

### To register with FirstLine:

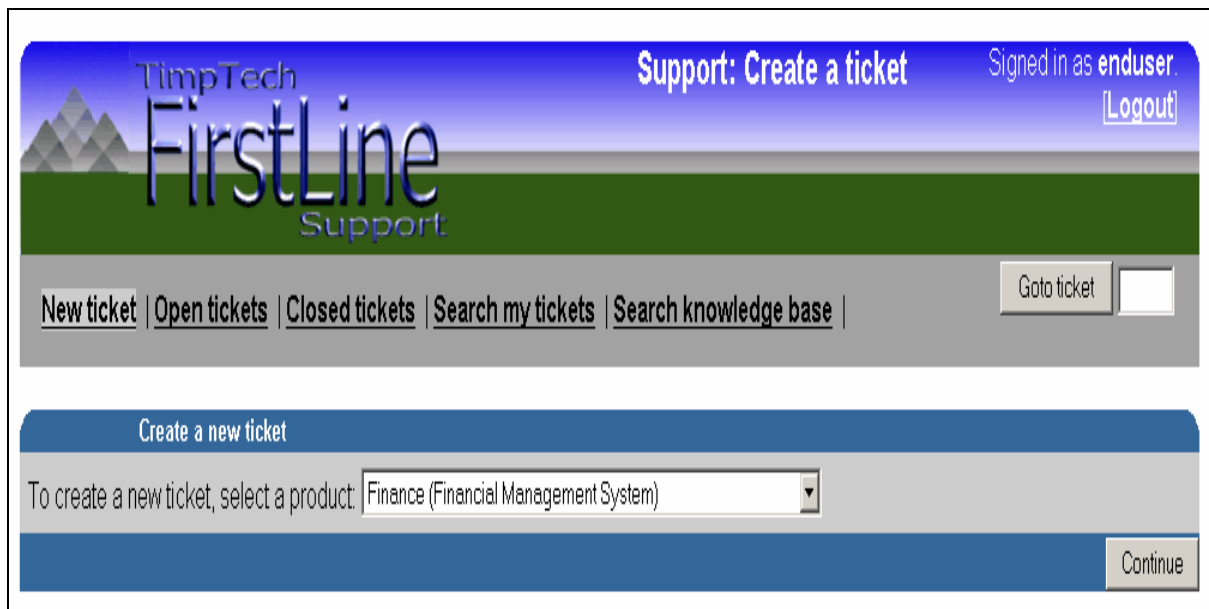
Click the e-mail link below to compose an e-mail message requesting registration. In the body of the message, include your name, district name, and the product/s you want to be able to report on. We will, in turn, provide you a user ID and password, your keys to logging into FirstLine.

[firstlineenrollment@timpotech.com/](mailto:firstlineenrollment@timpotech.com/)

## To create a new ticket:

### *Step 1*

After you log onto FirstLine, you will be able to create a new ticket. "Ticket" means a software request.



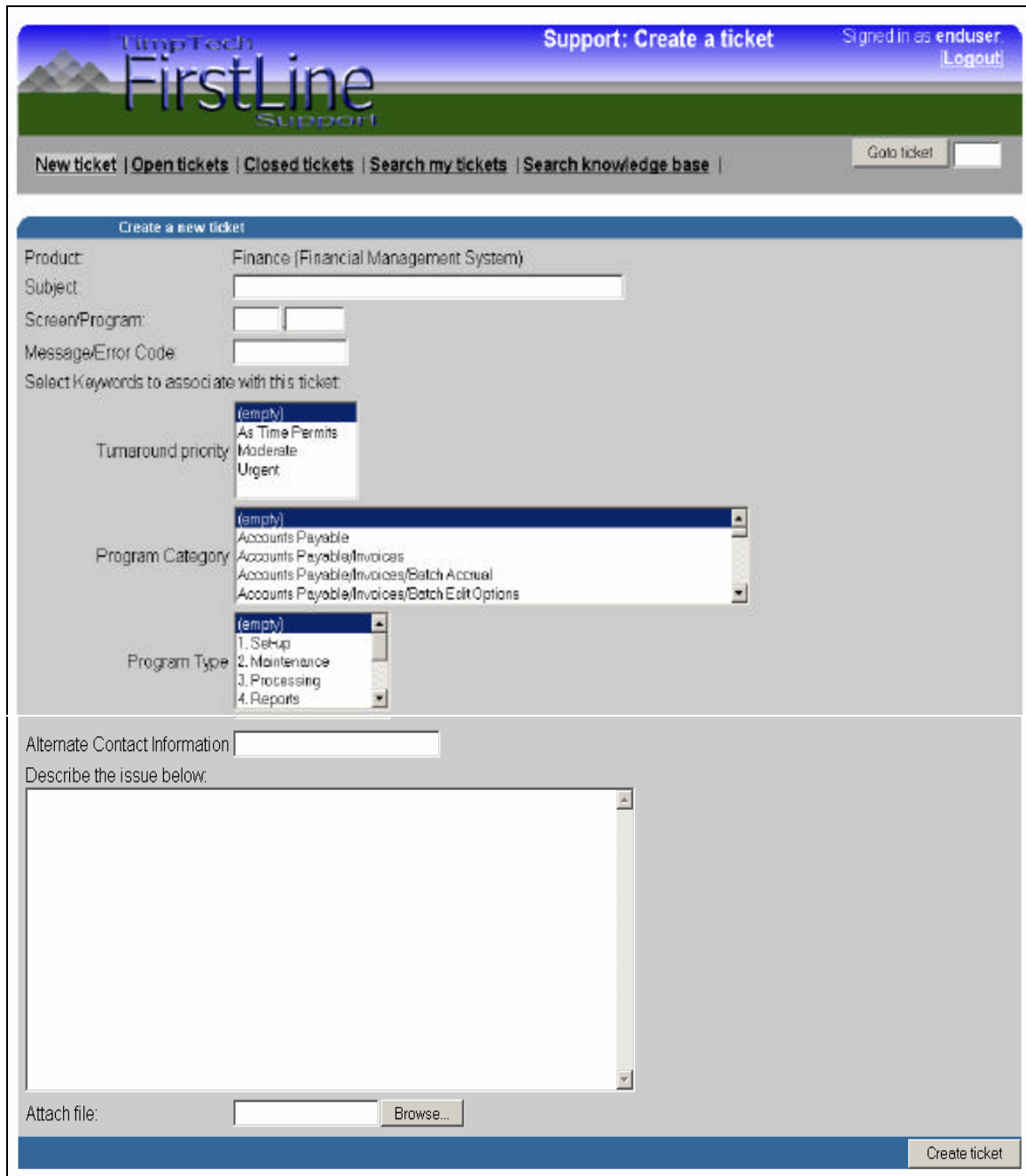
The screenshot shows the 'Support: Create a ticket' page in the FirstLine Support system. The page header includes the TimpTech logo, the title 'Support: Create a ticket', and the user 'enduser' is signed in with a 'Logout' link. A navigation bar contains links for 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base', along with a 'Goto ticket' button and a search input field. The main content area is titled 'Create a new ticket' and contains the instruction 'To create a new ticket, select a product:' followed by a dropdown menu currently showing 'Finance (Financial Management System)'. A 'Continue' button is located at the bottom right of the form.

Click the drop-down arrow to select a product, then click .

The list of products you see matches the list of products you included in your FirstLine registration request. If you do not see a desired product in the list, send us an e-mail addressed to [firstlineenrollment@timpotech.com/](mailto:firstlineenrollment@timpotech.com) and we will expand your registration to include it. In the meantime, continue to use our toll-free service, (866) 804-4636, to place your request for software assistance.

## Step 2


After selecting a product, use the following screen to provide details: (Depending on your monitor's resolution, you may need to page down to see the entire screen.)

The screenshot shows the 'Create a new ticket' form in the FirstLine Support system. The header includes the 'TimpTech FirstLine Support' logo, the text 'Support: Create a ticket', and the user's login information 'Signed in as enduser' with a 'Logout' link. Below the header is a navigation bar with links for 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base', along with a 'Go to ticket' button and an input field. The main form area is titled 'Create a new ticket' and contains several fields: 'Product' (set to 'Finance (Financial Management System)'), 'Subject' (text input), 'Screen/Program' (two small text inputs), and 'Message/Error Code' (text input). There are three dropdown menus: 'Turnaround priority' with options '(empty)', 'As Time Permits', 'Moderate', and 'Urgent'; 'Program Category' with options '(empty)', 'Accounts Payable', 'Accounts Payable/Invoices', 'Accounts Payable/Invoices/Batch Accrual', and 'Accounts Payable/Invoices/Batch Edit Options'; and 'Program Type' with options '(empty)', '1. Setup', '2. Maintenance', '3. Processing', and '4. Reports'. Below these is an 'Alternate Contact Information' text input field and a 'Describe the issue below.' text area. At the bottom left is an 'Attach file:' label with a text input and a 'Browse...' button. A 'Create ticket' button is located at the bottom right of the form.

Enter as much information as you can to describe your question or the problem you are having. Use the following Table Key for help in completing the screen:

Ticket Information	What To Enter
Subject	Enter a brief description of your question or software problem
Screen/Program	Enter a screen ID, which can be found at the top right corner of your screen (e.g. ACP.401.11) --OR-- Enter the ID of the software program you are using (e.g. ACP.401) --OR-- Leave this field blank
Message/Error Code	If you are trying to resolve a software error, enter the error (CPF4102) or screen message (GEN0023) here. Otherwise, leave the field blank.
Turnaround Priority	Select the priority that represents how soon you need a resolution to your question or problem.
Program Category	Select the description that best identifies the software feature you are reporting on.
Program Type	This code identifies the type of software program you are reporting on.
Alternate Contact Information	If we are to contact someone other than you regarding your ticket, use this field to identify who. Otherwise, leave it blank.
Describe the issue below	Enter a detailed description of your question or problem.
Attach file	This option allows you to attach information that will assist us in resolving your question or problem. For example, if an error occurs when you run a menu item, paste the error into a Word document and attach the document to your ticket. Use the Browse button to navigate to and attach the file to your ticket.

### Step 3

After you finish entering all pertinent information, click . You will see a message confirming that your ticket was added to the product queue. To log off FirstLine, click the Logout link located at the top right of your screen.

**To review a specific open OR closed ticket that you have logged:**

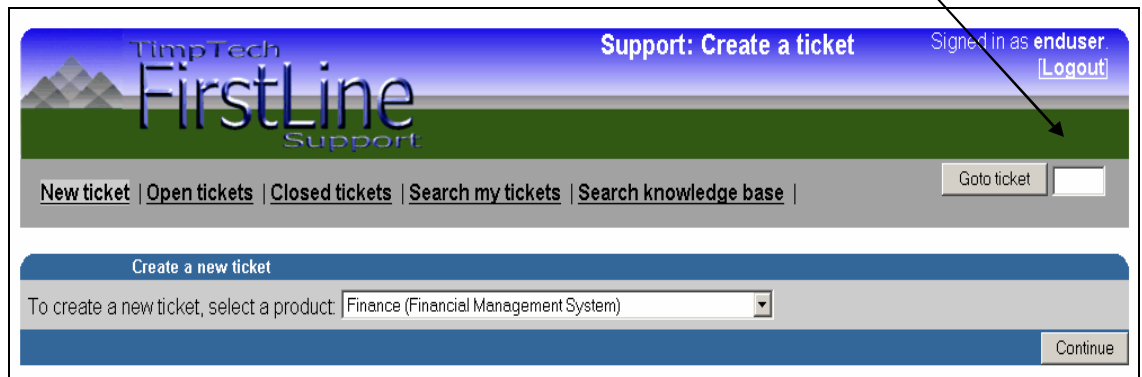
1. Log onto FirstLine.

2. Enter the ticket number in the white box to the right of

Goto ticket

3. Click

Goto ticket



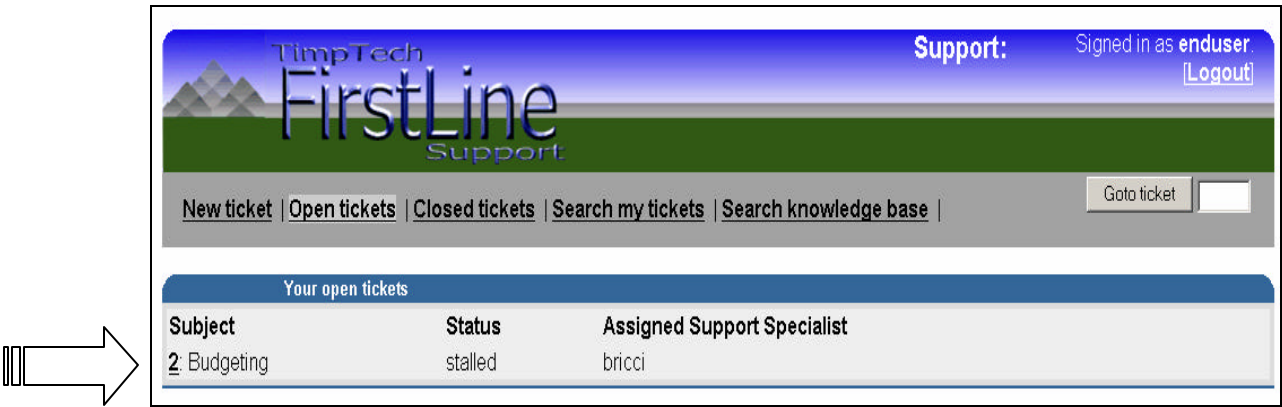
4. Then click the bolded ticket number to review the ticket.

**To review progress on all open tickets that you have logged:**

1. After you log onto FirstLine click **Open tickets**.



2. A list of your open tickets will display, similar to the list below:



The screenshot shows the 'FirstLine Support' interface. At the top, it says 'TimpTech Support' and 'Signed in as enduser [Logout]'. Below that are navigation links: 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base'. There is also a 'Goto ticket' button with an input field. The main section is titled 'Your open tickets' and contains a table with the following data:

Subject	Status	Assigned Support Specialist
<b>2</b> : Budgeting	stalled	bricci

3. To review progress on a ticket in the list, click the bolded ticket number.

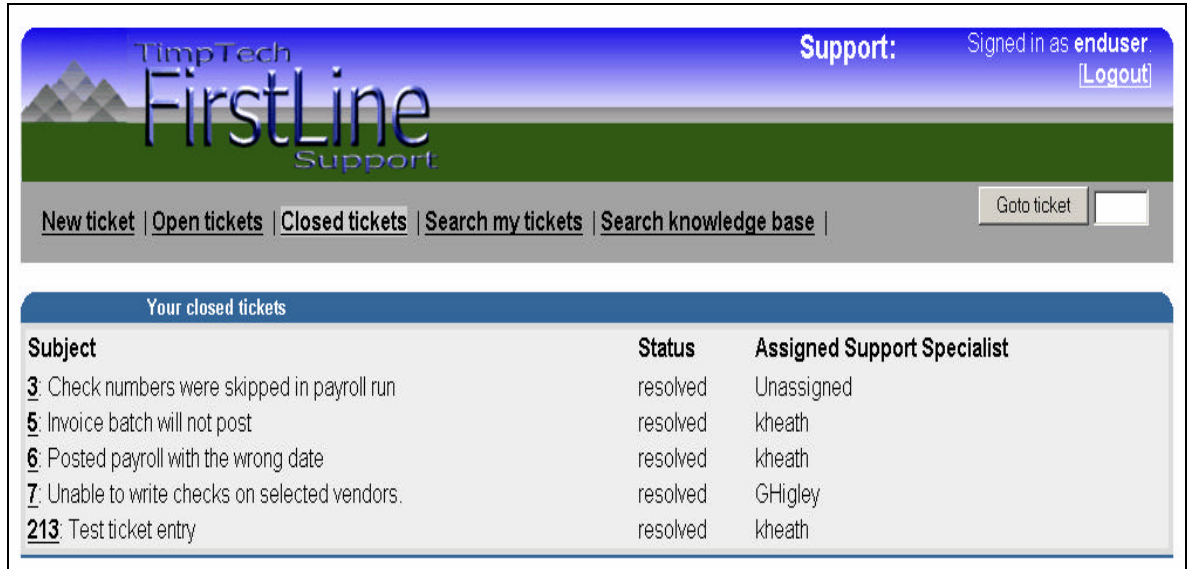
**To review progress on all closed tickets that you have logged:**

1. After you log onto FirstLine click **Closed tickets**.



The screenshot shows the navigation bar with the following links: 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base'. There is also a 'Goto ticket' button with an input field.

- A list of your closed tickets will display, similar to the list below:



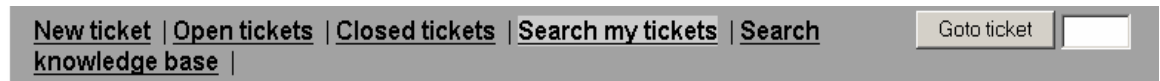
The screenshot shows the 'FirstLine Support' interface. At the top, there is a navigation bar with 'Support:' and 'Signed in as enduser. [Logout]'. Below this is a menu with links: 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base'. A 'Goto ticket' button is also present. The main content area is titled 'Your closed tickets' and contains a table with the following data:

Subject	Status	Assigned Support Specialist
<b>3</b> : Check numbers were skipped in payroll run	resolved	Unassigned
<b>5</b> : Invoice batch will not post	resolved	kheath
<b>6</b> : Posted payroll with the wrong date	resolved	kheath
<b>7</b> : Unable to write checks on selected vendors.	resolved	GHigley
<b>213</b> : Test ticket entry	resolved	kheath

- To review the details of a ticket in the list, click the bolded ticket number.

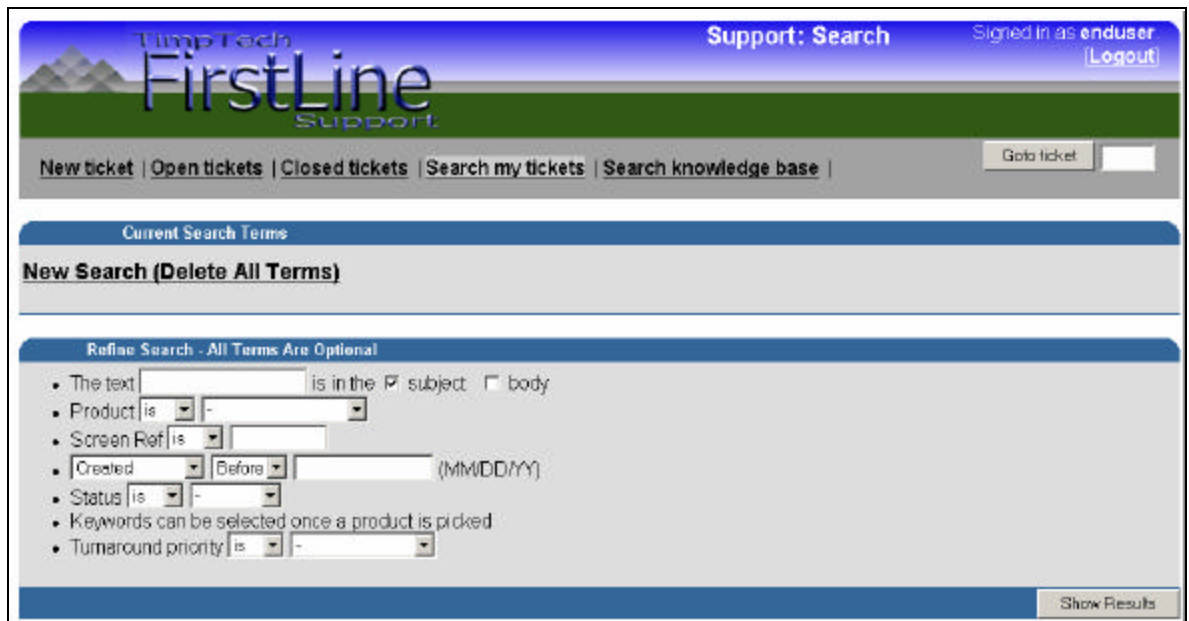
## To Search for Your Tickets (tickets you have logged into FirstLine):

- After you log onto FirstLine, click **Search my tickets**.



The screenshot shows the search navigation bar with the following elements: 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base'. A 'Goto ticket' button is also present.

- Use the search options presented on the following screen to define the information search you want to conduct.



The screenshot shows the 'FirstLine Support' interface. At the top, there is a navigation bar with 'Support: Search' and 'Signed In as enduser (Logout)'. Below this is a menu with 'New ticket', 'Open tickets', 'Closed tickets', 'Search my tickets', and 'Search knowledge base'. A 'Goto ticket' button is also present. The main section is titled 'Current Search Terms' and 'New Search (Delete All Terms)'. Underneath, there is a 'Refine Search - All Terms Are Optional' section with several filters:
 

- The text [input] is in the  subject  body
- Product is [dropdown] - [dropdown]
- Screen Ref is [dropdown]
- Created [dropdown] Before [dropdown] (MMDD/YY)
- Status is [dropdown] - [dropdown]
- Keywords can be selected once a product is picked
- Turnaround priority is [dropdown] - [dropdown]

 A 'Show Results' button is located at the bottom right of the search area.

Use the Table Key below for help in completing the screen.

**Table Key**

<i>Search Option</i>	<i>Description</i>
Enter a phrase and indicate if the program is to search the subject line or the body of text in the tickets that are searched.	Consider using a key word (e.g. taxes) or a key phrase (e.g. month end close).
Identify the product to include or exclude in the search (e.g. Payroll).	To include a product, select IS. To exclude a product, select ISN'T.
Identify the screen reference your question or problem is about (e.g. PAY.302.11).	Select IS to include a screen reference. Select ISN'T to exclude a screen reference.
Use a date to search for records. The date must be entered in MMDDYY format (e.g. December 15, 2004 would be entered as 121504).	You can search for tickets that were Created, Started, Resolved, Last Contacted, Last Updated, Starts Before, or is Due Before, On, or After the date you specify.
Identify the status of the ticket/s to include in your search.	Status options include: New, Open, Stalled, Resolved, or Dead.
Identify the urgency of the ticket/s to be included in your search.	Search options include: As Time Permits, Moderate, or Urgent.

3. Then click .
4. A list of tickets will appear for your review. To review a specific ticket, click the bolded ticket number. To refine your search even further, use the search options at the end of the list of tickets.
5. To begin a new search, click **New Search (Delete all Terms)**.

Current Search Terms
Subject LIKE taxes <input type="button" value="delete"/>
Queue = Finance <input type="button" value="delete"/>
<b><a href="#">New Search (Delete All Terms)</a></b>

## To Conduct a System-wide Search:

The process for searching the entire knowledge base is the same as searching for your own tickets. The difference is in search results. The Search knowledge base option performs a system-wide search and includes all tickets, yours and others, based on your search criteria.

To begin, click Search knowledge base. Then proceed with defining your search criteria:

<a href="#">New ticket</a>   <a href="#">Open tickets</a>   <a href="#">Closed tickets</a>   <a href="#">Search my tickets</a>   <input type="button" value="Search"/>	<input type="button" value="Goto ticket"/> <input type="text"/>
<a href="#">knowledge base</a>	

TimpTech FirstLine Support		Support: Knowledge Base Search	Signed in as enduser <a href="#">Logout</a>
<a href="#">New ticket</a>   <a href="#">Open tickets</a>   <a href="#">Closed tickets</a>   <a href="#">Search my tickets</a>   <input type="button" value="Search"/>		<input type="button" value="Goto ticket"/> <input type="text"/>	
<a href="#">knowledge base</a>			
Refine Search - All Terms Are Optional			
<ul style="list-style-type: none"> <li>• The text <input type="text"/> is in the <input checked="" type="checkbox"/> subject <input type="checkbox"/> body</li> <li>• Product is <input type="text"/> - <input type="text"/></li> <li>• Screen Ref is <input type="text"/></li> <li>• Created <input type="text"/> Before <input type="text"/> (MM/DD/YY)</li> <li>• Status is <input type="text"/> - <input type="text"/></li> <li>• Keywords can be selected once a product is picked</li> <li>• Turnaround priority is <input type="text"/> - <input type="text"/></li> </ul>			
			<input type="button" value="Show Results"/>