SUNGARD

BI-TECH

IFAS

Support Online Guide

NOTICE

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Should you wish to make a comment, or if you find an error in the text, please contact us via email:

doc@bi-tech.com

Document Change Log

Version	Date	Change Description
7.9	9.4.2007	7.9 Version

Contents

1. Introduction

This Quick Start will guide you through the basic steps of using Support Online. Users of the system will be able to quickly access ticket information from any computer with an Internet connection. Support Online allows clients and staff members to take advantage of this convenient online ticket management system.

This guide will provide explanations of processes, definitions of terms, and examples.

2. Learning Objectives

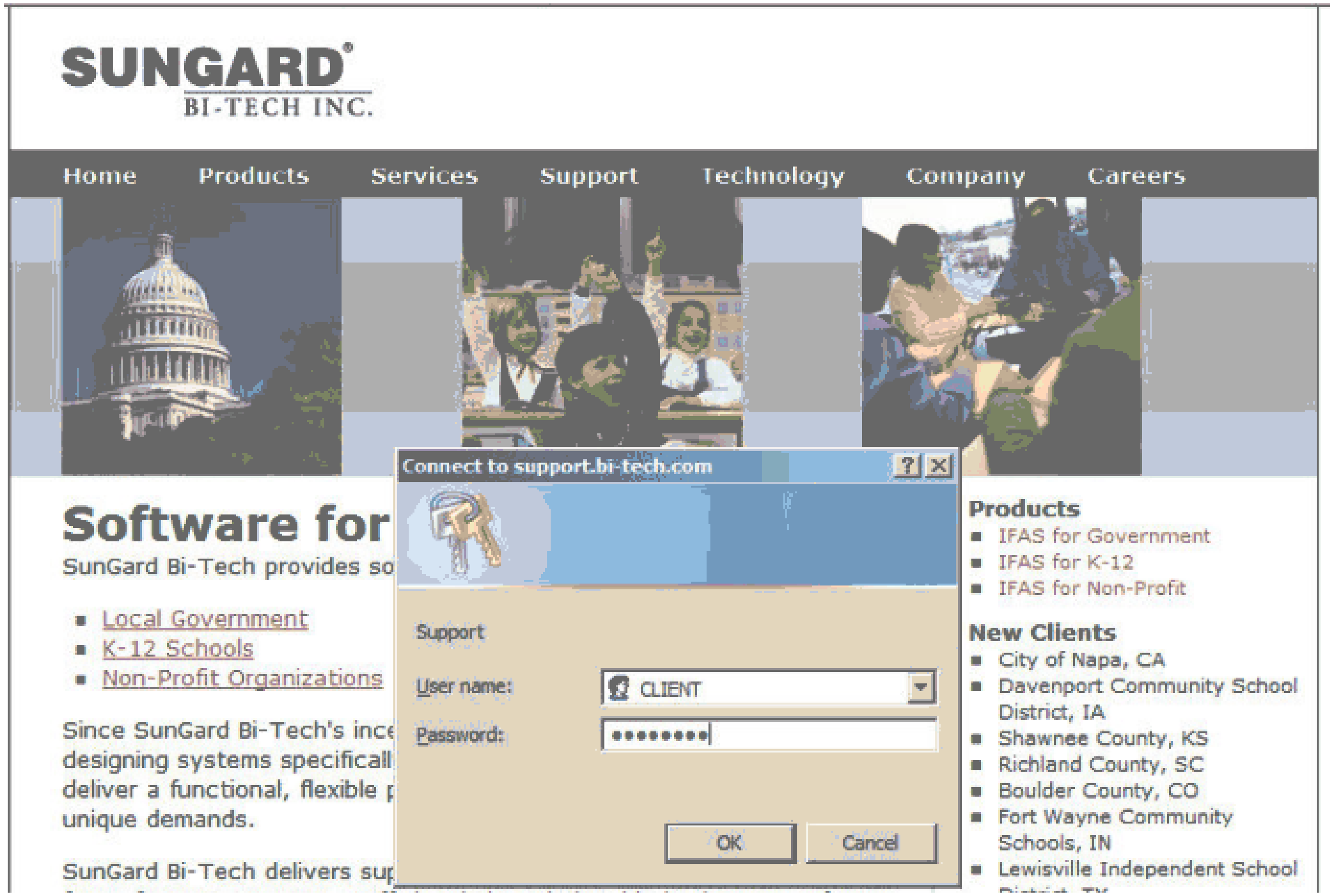
When you finish reading this guide you will be able to:

- Get to Support Online
- Login
- Navigate Support Online
- Use the Knowledge Base
- View tickets
- Add Alerts (Ticket communication tool)
- View and edit contact information

3. How Do I get to Support Online and login?

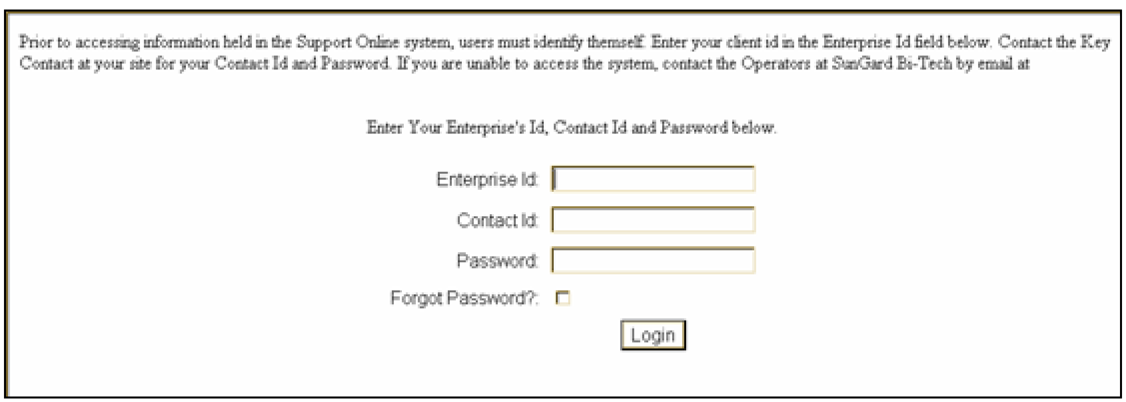
1. Go to the following website: www.sungardbi-tech.com

2. Click on the Support link and you will be prompted to login.



4. Click on the Client link.

5. Enter your Enterprise ID, Contact ID, and Password. (If you do not know them, please contact your Account Manager).



Note: If you can't remember your password or need to create one, click the "Forgot Password" checkbox to run the password utility. To begin, you will be prompted to enter your email address.

This utility sets up a client to access Support Online. Enter your Enterprise Id, Contact Id and email address. A new password will be generated and emailed to the email address for that contact as defined in Support Online If problems persistent on getting connected to Support Online, contact the SunGard Bi-Tech operators at support@bi-tech.com.

Enter the Client Id and Contact Id and Email address in the fields below.

Client Id (Required): SBIHD

Contact Id (Required): TORYH

Email (Required): TH@BI-TECH.COM

Change Passwords

After clicking the "Change Passwords" button, you will receive an email much like the one below.

From: *Helpdesk (Operators) Sent: Tue 9/4/2007 9:35 AM

To:

Cc:

Subject: Support Online Info

```
Your password for logging onto Support Online
has been reset to "4VO2A=X".
The password has been sent to the email
address specified.  Next time you access
Support Online use this password to gain
initial access.  You'll be prompted to change
your password at that time.  Thanks for using
Support Online.
```

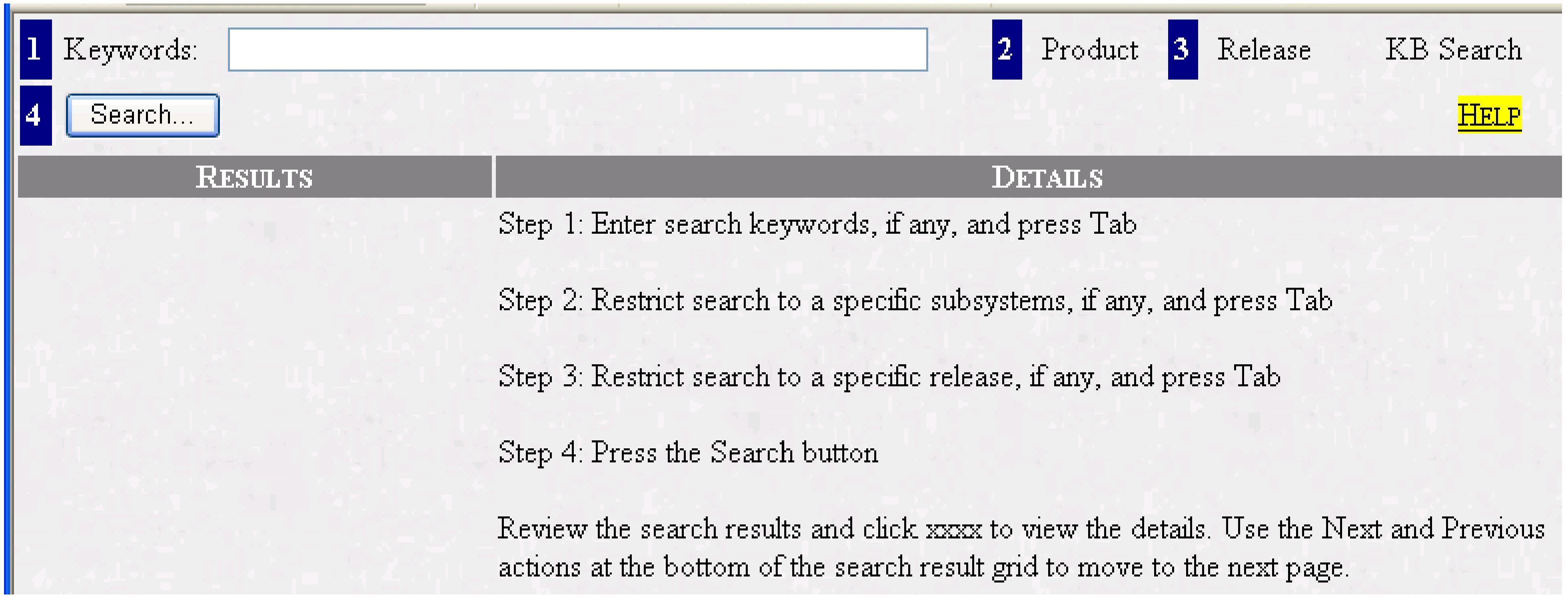
4. How Do I Navigate Support Online?

The top section of all screens contains a set of tools that will vary slightly depending on which screen you are viewing. The complete set of tools is displayed on the Ticket Details screen and is shown below:

Explanation of the tools listed above

1. Requery: This is a search function. When it displays as Requery, the view will contain details about the given ticket: contact info, etc. When it displays as Search, these same files will not be populated until you click Search. This tool toggles back and forth between Requery and Search depending upon your current view.
2. First: This option allows you to go to the first record in the database.
3. Previous: This option allows you to go to the previous record in the database.
4. Last: This option allows you to go to the last record in the database.
5. Discard: This allows you to discard the entry you are currently viewing.
6. Help: This feature displays technical information relating to the field you are currently using.

7. Knowledge: The Knowledge Base takes you to a different screen that allows you to perform an in-depth search of the database. You can enter keywords and select the Source in which to search. See below:



Follow the instructions on the screen to search the KB records.

Once you have clicked Search, a new window will open with a comprehensive list of all items associated with your topic. These items will have a number, a rank, and a description. Each item is also a link to an HTML file that you can view. See below:

General Entries:

Document	Rank	Summary
2851.htm	288	ADDLINFO: CHANGING STATE TAX RATE OR HOME TAX RATE.. KB Id:. 2851. Create Date:. 10/8/2002 6:17:30 PM. Subsystem:. Mask:. Version:. Service Pack:. DB Type:. DB Version:. OS Type:. OS Version:. Author:. THAM. Last Revised:. Details:. If your state requires your site to be base on a new state tax rate or home
2932.htm	128	ADDLINFO: QUICK REFERENCE FOR RUNNING 1099-MISC FORMS. KB Id:. 2932. Create Date:. 11/6/2002 2:49:19 PM. Subsystem:. 99. Mask:. CK99CB. Version:. NA. Service Pack:. N/A. DB Type:. DB Version:. OS Type:. OS Version:. Author:. CHERI. Last Revised:. Details:. Below is a quick reference guide for clients that
2865.htm	128	ADDLINFO: CLUSTERS AND ATTRIBUTES FOR PAYROLL CALC CODES IN A CHEATSHEET.. KB Id:. 2865. Create Date:. 10/9/2002 3:17:37 PM. Subsystem:. PY. Mask:. Version:. Service Pack:. DB Type:. NA. DB Version:. OS Type:. OS Version:. Author:. DAVIDM. Last Revised:. Details:. This document lists the most commonly used Cluster
2157.htm	128	ADDLINFO: COPY TAX TABLES AT YEAR END.. KB Id:. 2157. Create Date:. 8/26/2002 3:34:10 PM. Subsystem:. PY. Mask:. NUUTGC. Version:. NA. Service Pack:. DB Type:. DB Version:. OS Type:. OS Version:. Author:. EDK. Last Revised:. 11/20/2002. Details:. Use NUUTGC to copy tax tables at year end. This is
3714.htm	96	FAULT: AID MODULE UCX507 TAX FORM CODE DOCUMENTATION ERROR.. KB Id:. 3714. Create Date:. 4/18/2003 7:25:41 AM. Subsystem:. SS. Mask:. Version:. Service Pack:. DB Type:. DB Version:. OS Type:. OS Version:. Author:. TIMOTHYR. Last Revised:. Details:. For the UCX-VALUE Return Type the documentation sa
2184.htm	96	ADDLINFO: HOW PAY BASE CONTROL WORKS. KB Id:. 2184. Create Date:. 9/4/2002 12:14:15 PM. Subsystem:. PY. Mask:. Version:. Service Pack:. DB Type:. NA. DB Version:. OS Type:. OS Version:. Author:. EDK. Last Revised:. 12/6/2002. Details:. How Pay Base Control Works. Extended Text:. Pay base control is set o
2183.htm	80	ADDLINFO: CUMULATIVE WAGE CALCULATION. KB Id:. 2183. Create Date:. 9/4/2002 12:12:59 PM. Subsystem:. PY. Mask:. Version:. NA. Service Pack:. DB Type:. DB Version:. OS Type:. OS Version:. Author:. EDK. Last Revised:. 12/12/2002. Details:. We use the cumulative wage method to figure this out-Here is how it works..
3565.htm	64	FAULT: IRS REJECTS THE 1098T FILE FOR TAX YEAR 2002.. KB Id:. 3565. Create Date:. 2/21/2003 9:11:46 AM. Subsystem:. ARCR. Mask:. ARRE98FT,ARRE98T. Version:. TX02. Service Pack:. DB Type:. DB Version:. OS Type:. OS Version:. Author:. MARK. Last Revised:. Details:. IRS rejects the 1098T file. T record has invalid i
2888.htm	64	FAULT: UNABLE TO USE MOUSE TO ACCESS CERTAIN FIELDS ON POUPPR WEB BASED SCREEN.. KB Id:. 2888. Create Date:. 10/18/2002 1:08:21 PM. Subsystem:. PO. Mask:. POUPPR. Version:. 721. Service Pack:. N/A. DB Type:. NA. Problem identified in 7i web based POUPPR screen where fields can not be accessed via a mouse click..
2990.htm	48	ADDLINFO: OHIO PERS DOCUMENTATION. KB Id:. 2990. Create Date:. 11/20/2002 11:09:47 AM. Subsystem:. PY. Mask:. NA. Version:. Service Pack:. DB Type:. DB Version:. OS Type:. OS Version:. Author:. SARAHB. Last Revised:. Details:. The

After clicking on one of the links, a new window will open with the information on that topic displayed. Notice that in this case, there is a document attached to this item for more information important to the topic. It is a link to a file that will open in a separate window. See below:

KB Id:	2932	**Create Date:**	11/6/2002 2:49:19 PM
Subsystem:	99	**Mask:**	CK99CB
Version:	NA	**Service Pack:**	N/A
DB Type:	NA	**DB Version:**	N/A
OS Type:	NA	**OS Version:**	N/A
Author:	CHERI	**Last Revised:**	11/6/2002

Details:
Below is a quick reference guide for clients that have already processed 1099-MISC forms through IFAS. This reference is intended to help you get started this year.

Extended Text:

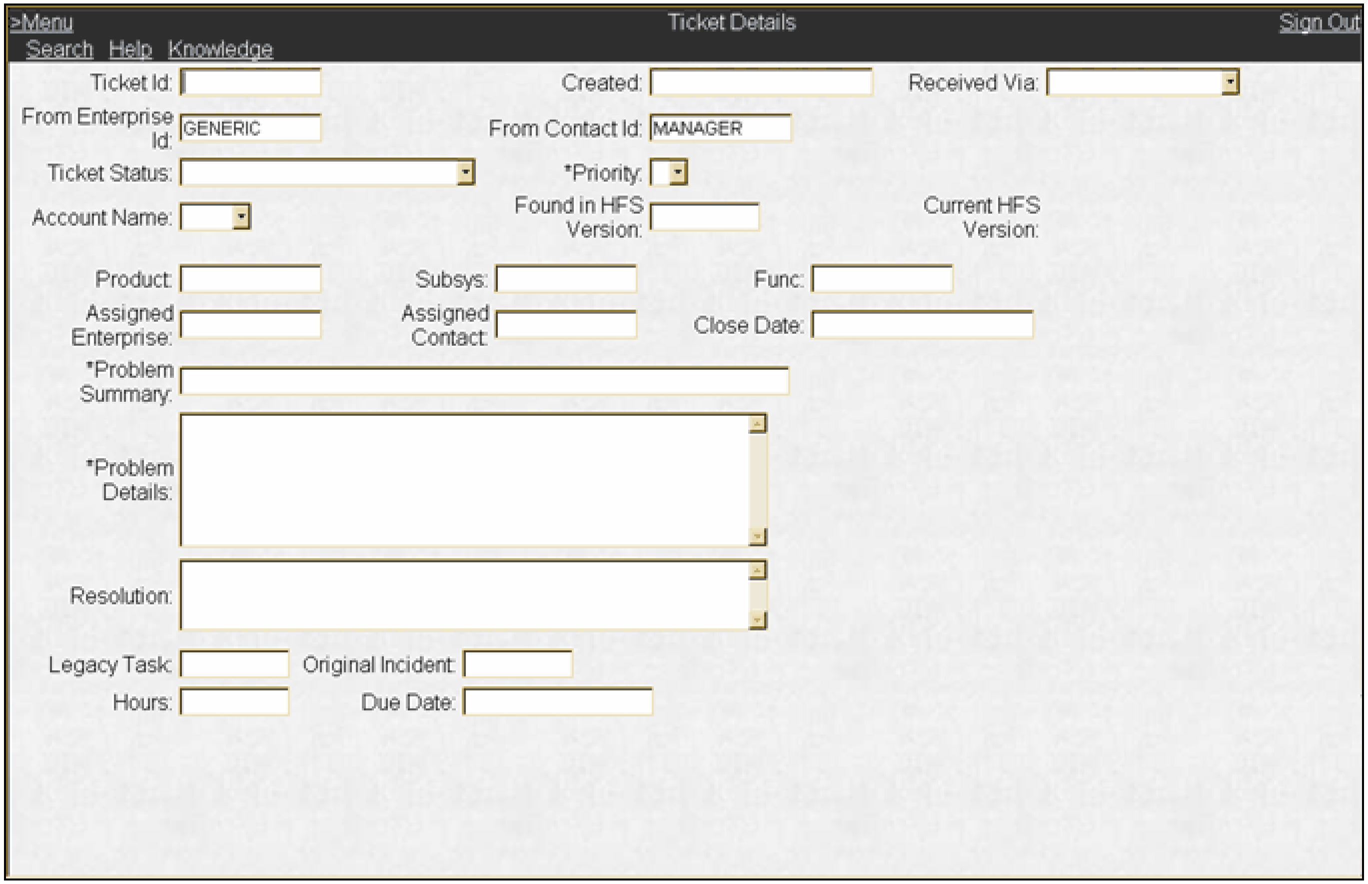
1099-MISC

Quick Reference Guide

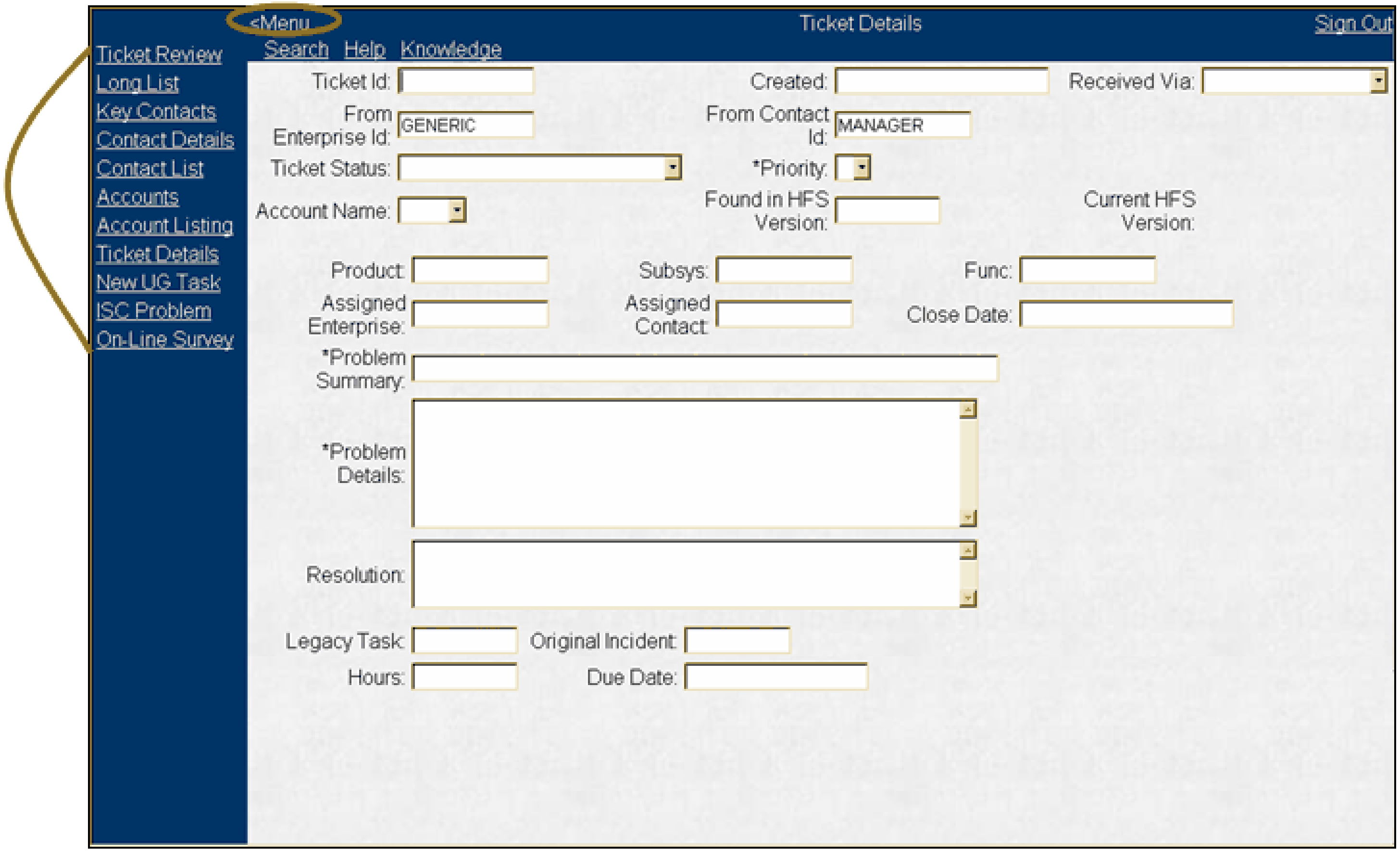
The purpose of this Quick Reference Guide is to provide clients who have already processed 1099-MISC forms in IFAS with a quick check-list to get started this year. If more detail information is needed, please refer to the remainder of *1099-MISC Forms Made Easy*, *Common Code Reference Manual, Check Management User's Guide* and/or *Bank Reconciliation User's Guide.*

1. Read and apply any changes described in the section **'What's New for 2002'** of *1099-MISC Forms Made Easy*.
2. Modify the year on the common code CK99 FILEINFO in NUUPCD. The current tax year should be defined in Numeric Value (1) field as '2,002.00000'. If more detail is needed, please reference the *Common Code Reference Manual.*
3. Review common code CK99 TRECINFO. Particularly note if the Contact person for 1099-MISC has changed this year. Associated Description (1) and (2) contain the Contact PE ID and Contact Address Code. The PE IDs are defined in PEUPPE. If more detail is needed, please reference the *Common Code Reference Manual and/or Person Entity User's Guide.*
4. Verify your data. Run the 1099-MISC report to see who is qualifying for a 1099-MISC. If your checks are recorded in the CK database, then use CK99CB; if you use BK database then run BK99CB.
5. Run a test print of about 5 1099-MISC forms to verify that the alignment and page breaks are correct. Please plan this early so that if there are any printing problems there is sufficient time to troubleshoot and get the forms printing successfully. The process to use for CK is CK99CC; for BK it is BK99CC.

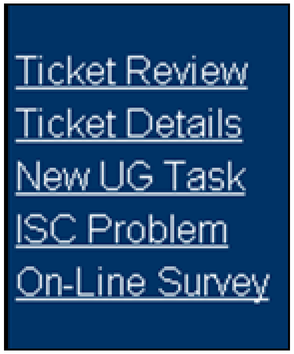
Once you have logged in, the first screen you will see will be:



Menu: This link allows you to toggle back and forth to hide or show the menu on the left side of the main window. The screen shot above has the Menu hidden. The following page shows a screen shot with the Menu displayed.

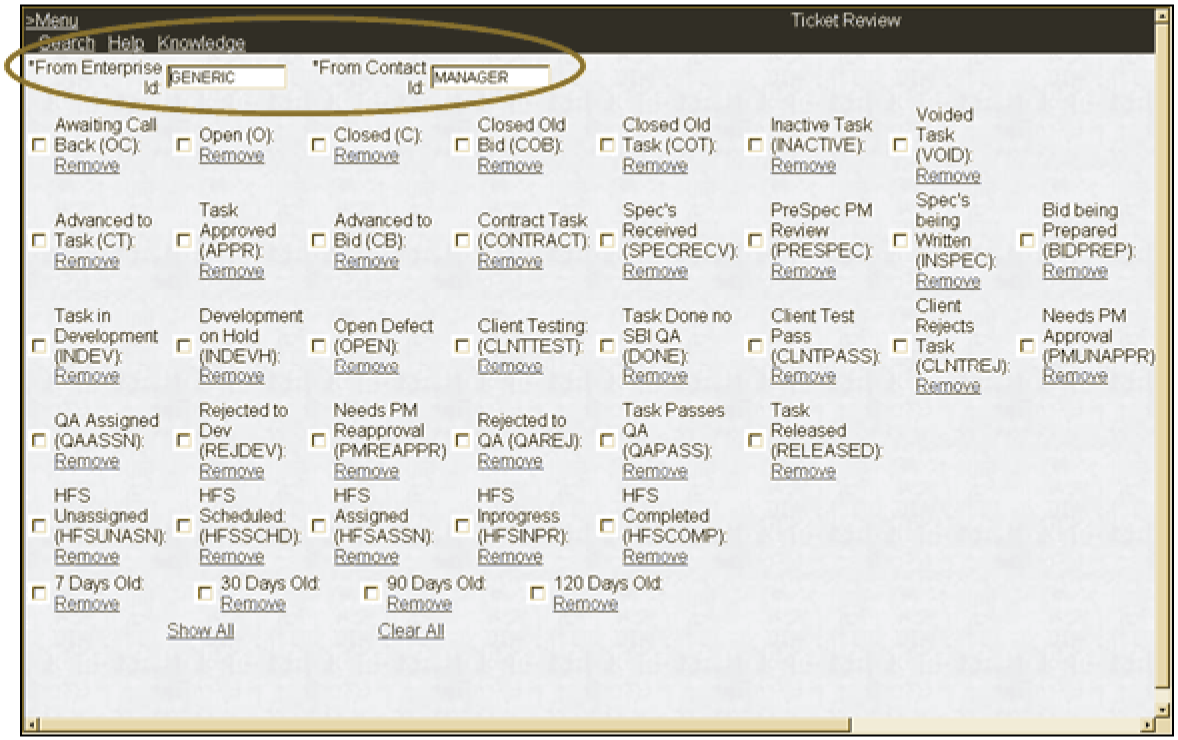


NOTE: If you have logged in as a User, not a Manager, your menu options will be:



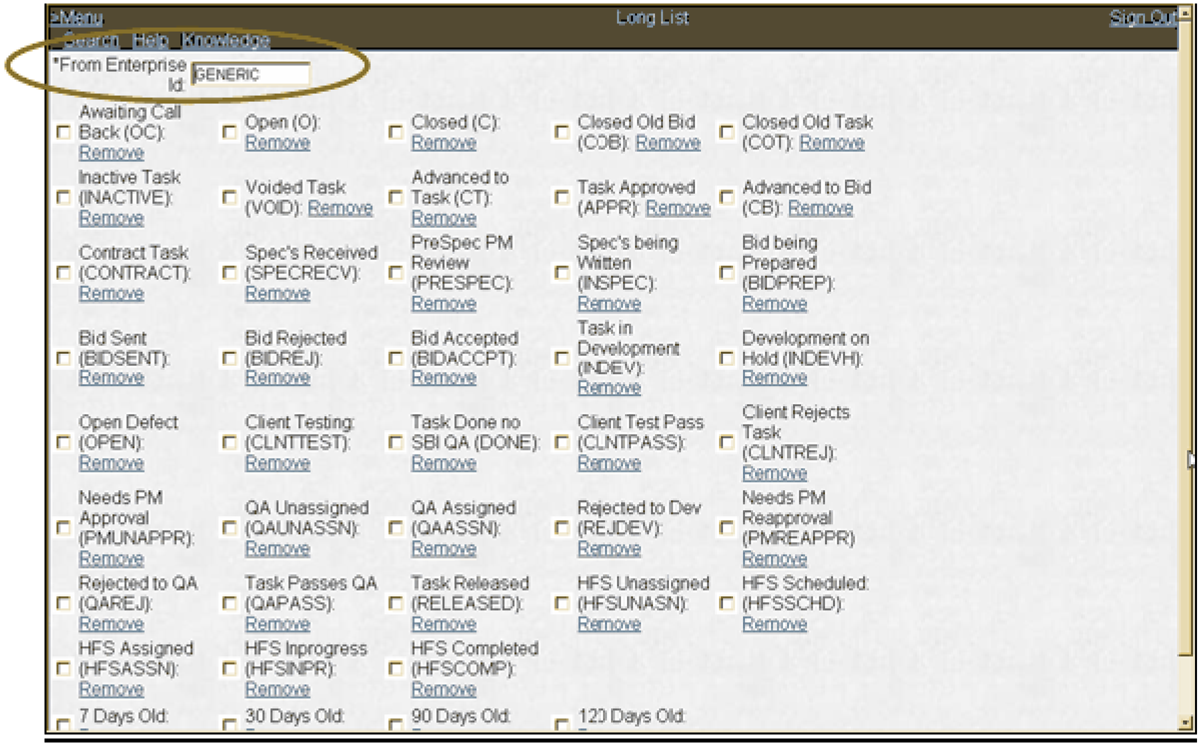
5. Menu Options Explained

1. **Ticket Review:** This screen will allow you to see all of the states associated with a given ticket. These states are items such as: Awaiting Call Back, Open, Closed, Task in Development, etc. From this screen you can hide or show all of these ticket options by using the checkbox feature and then clicking on Show All or Clear All, or you can remove one item at a time by clicking the checkbox associated with the item to be hidden and clicking Remove. See the image below:

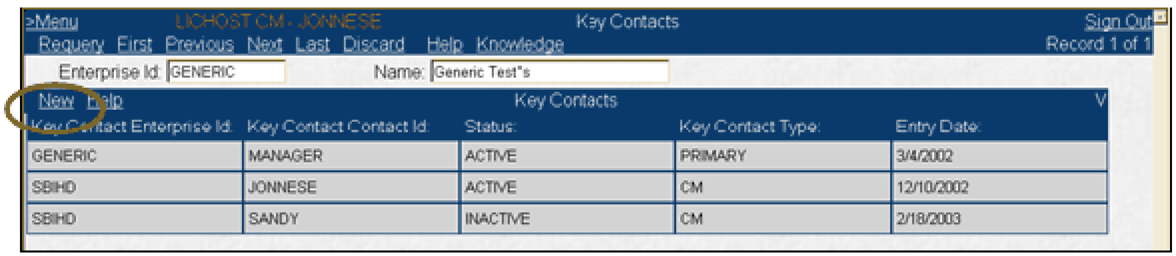


2. **Long List:** This screen displays the information seen above in the same format, but instead of the display being according to the contact, the information is displayed by Enterprise. See below:

NOTE: If you have logged in as a regular user (not a manager), you will only be able to view your own tickets.

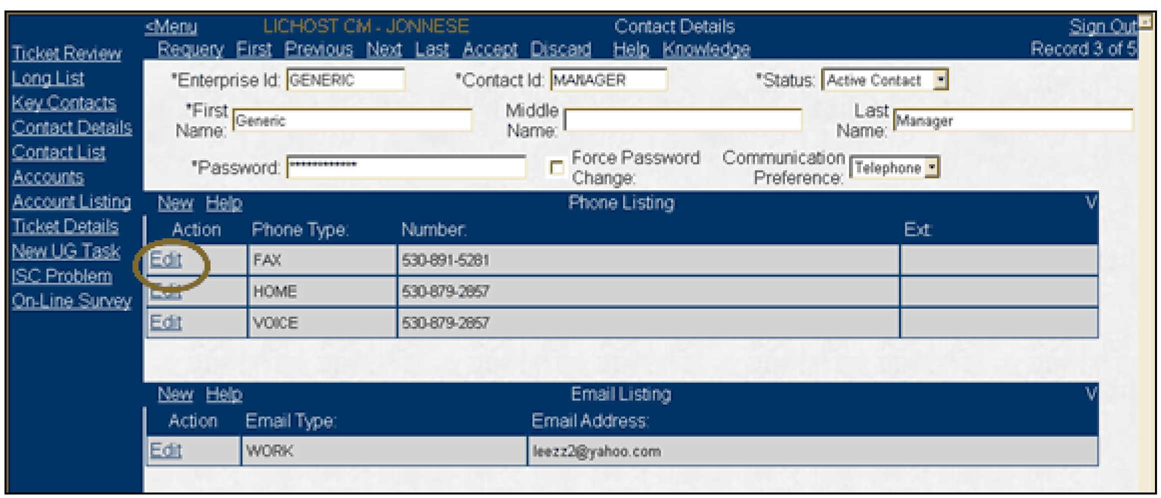


Key Contacts: This view displays the Key Contacts for a given Enterprise. Key contact is the person able to see all tickets for the site (no restrictions). Non-key contact users only see the tickets they have initiated. There two types of Key Contacts: Primary Key Contact - this is usually one person at the site. This person usually will have even greater abilities in that they can view contact info and compete defining a contact as a primary key contact. They need to have a security class of "Manager" on the contact information screen. Alternative Key contact - this is usually a group of persons. They see all tickets for the site, but not the contact information. The security class on the contact info screen is "User". The clients can not see what their security class is, but they can tell by the number of items they see on the menu list (refer to the menu list shown on page 9). See below:

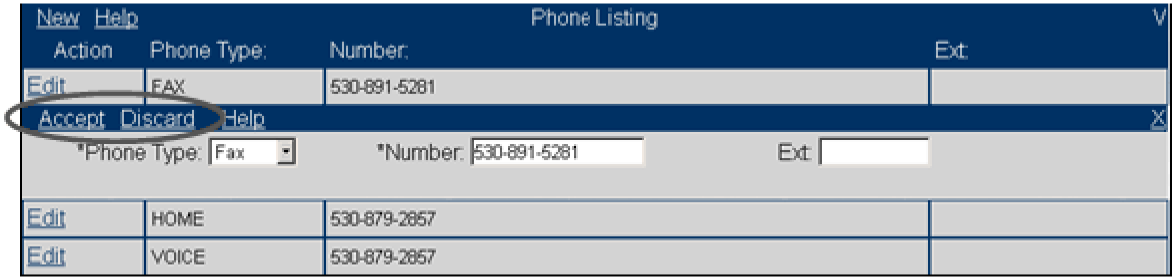


Note: Call the help desk to add a new client. You will not be able to add a new entry without help desk assistance.

3. **Contact Details:** This screen allows you to view and edit Key Contact information. You will be able to view and edit phone, fax, and e-mail information for your Key Contacts. To add new contacts you must call the help desk at 1.800.851.4800.

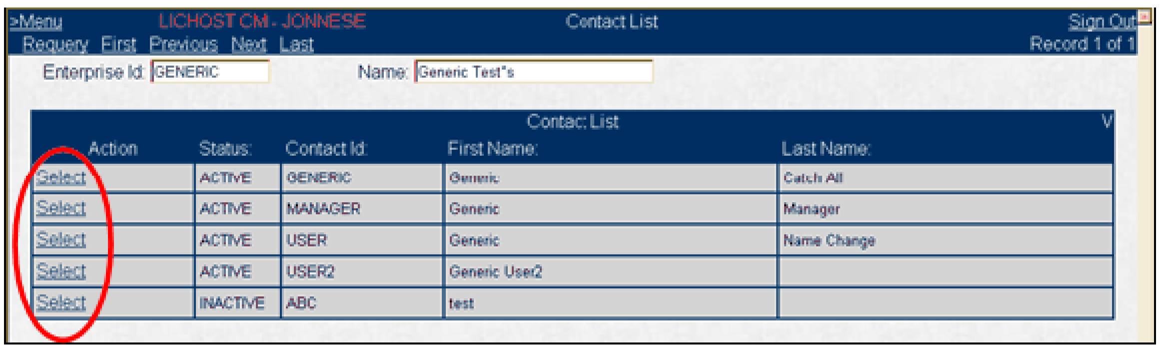


When you click on the Edit link to edit a Phone Listing, you will see the following:

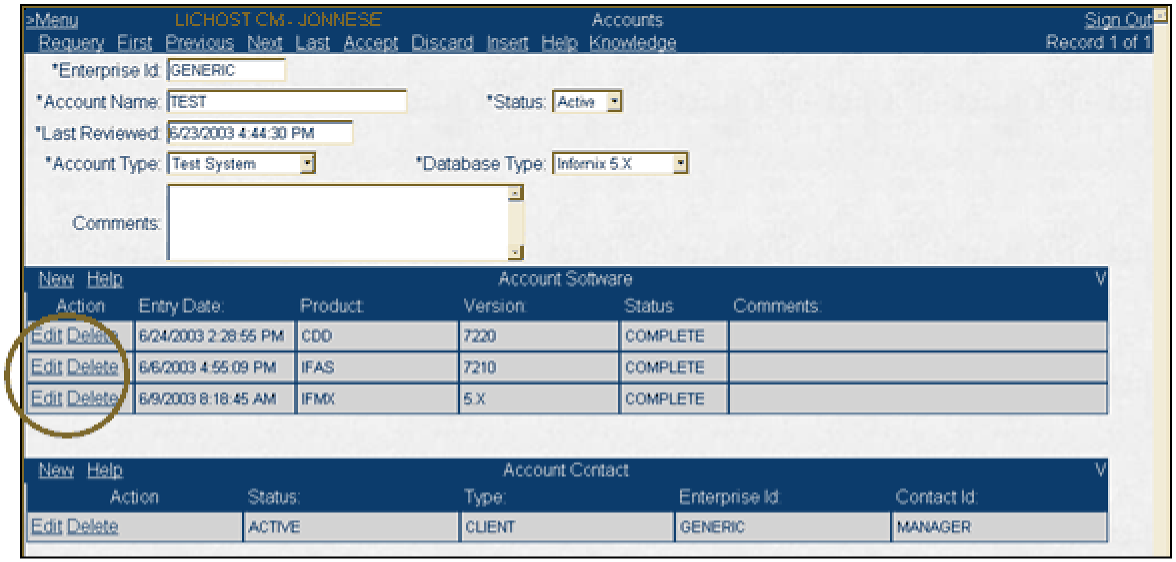


From the view shown above, you can select the Phone Types, change the phone number, and add an extension. When you have made the necessary changes, click Accept. This same action is used for editing e-mail addresses too (under the e-mail section).

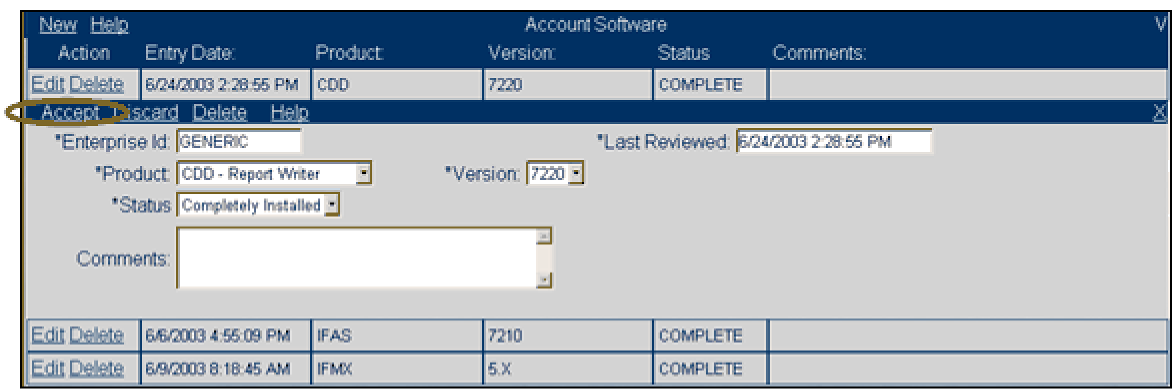
4. **Contact List:** This view allows you to view a list of Contacts, and to select an individual Contact to view the details of. When you click on the Select link next to a given Contact, a new window opens that displays the Contact Details as shown previously. See below for the Contact List view:



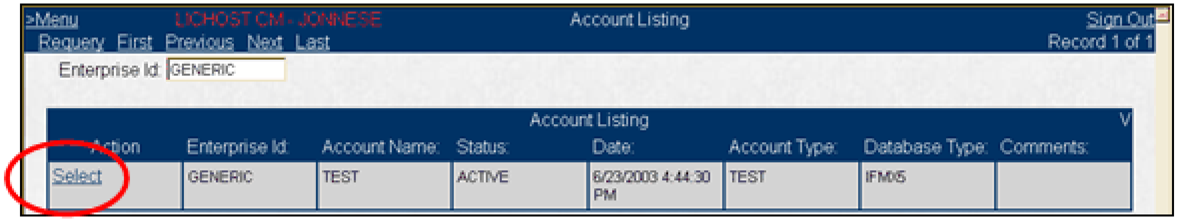
5. **Accounts:** (Visible only when logged in as a Manager)The Accounts view displays details about all existing Accounts, including software information, and contact information. This view allows you to edit information too. See below:



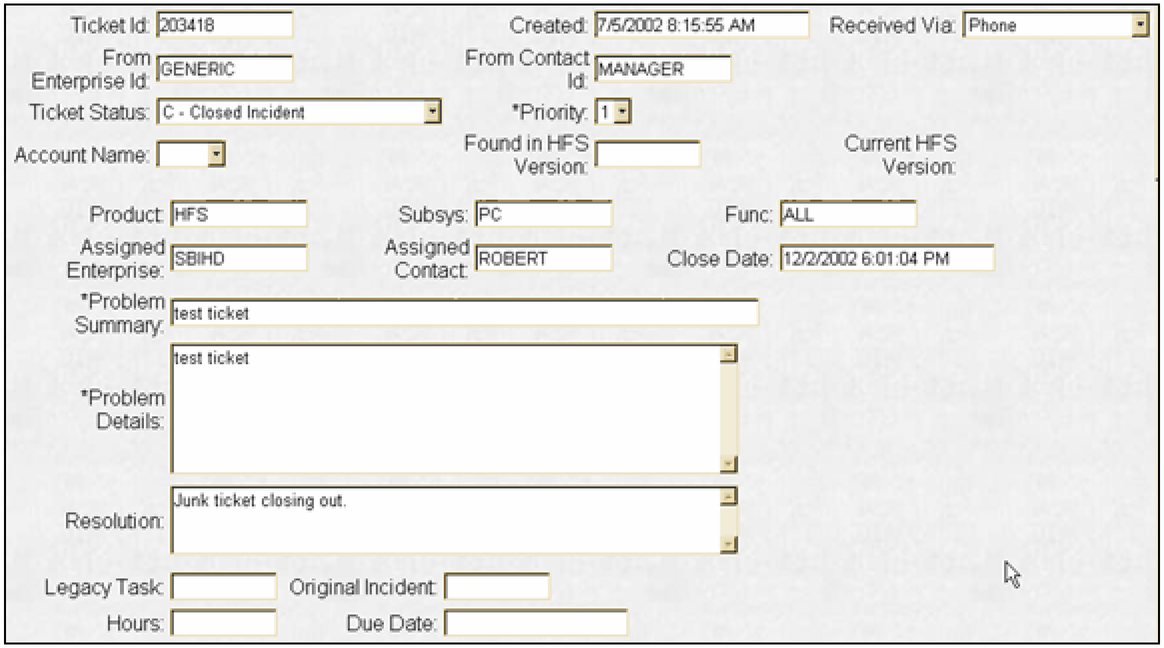
When you click on Edit next to a software product listed for the Account, a view displays with details about the product. You can make changes to this information and click Accept to keep the edits. See below:



6. **Accounts Listing:** This displays all of the Accounts within a given Enterprise. It allows you to select from the Account List to view Account details as seen above. See the image below for the Accounts Listing view:



7. **Ticket Details:** The Ticket Details view allows you to see all information associated with a given ticket. The top section of this view displays information such as: Ticket ID, Status, Priority, and Problem Details. This section of this view is shown below:



The view that follows the Detailed view is the Alert Listing. This is a comprehensive list of all Alerts associated with a given ticket. It displays the Alert ID, Entry Date, Enterprise, Contact, method of communication, and Notes. If you wish to add an attachment to the list, reply to the ticket email WITHOUT MAKING ANY CHANGES TO THE SUBJECT LINE.

New Help Alert Listing

Alert Id:	Entry Dt:	From Enterprise:	From Contact:	Communicated via:	Alert Note:
2133259	12/2/2002 6:01:28 PM	SBIHD	ROBERT	ISC	Notification of ticket closure, last communication follows. Junk ticket closing out.
2118181	11/1/2002 3:59:54 PM	SBIHD	ROBERT	ISC	Hello Generic Manager; In researching the ticket I have found a knowledge base entry that addresses the problem identified. You will find a link below that takes you directly to that entry. Please let me know if the information in the knowledge base entry is unclear or in need of clarification. Thanks
2083198	9/20/2002 4:26:45 PM	GENERIC	MANAGER	ISC	how it going?
2078870	9/11/2002 1:43:55 PM	SBIHD	ROBERT	EMAIL	test
2076570	9/5/2002 4:31:54 PM	SBIHD	ROBERT	EMAIL	test of alert
2076327	9/5/2002 12:55:52 PM	SBIHD	ROBERT	ISC	Hello Generic Manager; In researching the ticket I have found a knowledge base entry that addresses the problem identified. You will find a link below that takes you directly to that entry. Please let me know if the information in the knowledge base entry is unclear or in need of clarification. Thanks
2076232	9/5/2002 11:19:33 AM	SBIHD	ROBERT	ISC	Hello Generic Manager; In researching the ticket I have found a knowledge base entry that addresses the problem identified. You will find a link below that takes you directly to that entry. Please let me know if the information in the knowledge base entry is unclear or in need of clarification. Thanks
2065861	8/9/2002 10:58:24 AM	SBIHD	ROBERT	EMAIL	test

The next view, listed under the Alerts Listing section, is the Attachment List. This view lists the Ticket ID, the Date the file was attached, a file description, and a link to the attached file. When you click on the link for an attachment, you will be able to view the file in a new window. See below:

Help Attachment List

Ticket Id:	Date Attached:	File Description:	New File:
203418	7/6/2002 9:10:06 AM	Copy of Email	A17897 Email Attachment.txt
203418	7/5/2002 9:06:27 AM	atest	A17895 BANNER.JPG
203418	7/5/2002 8:53:40 AM	atest	A17893 BANNER.JPG

8. New Task or Problem

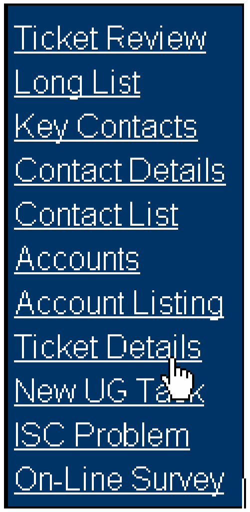
If you have a new ticket request or a problem to report, complete the following form and send it to SunGard Bi-Tech via email or fax.

You may complete this form and return it via email or fax it to SunGard Bi-Tech. Include any supporting information such as screen prints, tail sheets, error messages etc. The email address is support@sungardbi-tech.com. The fax number is 530-891-4816. The Help Desk phone number is 1-800-851-4800.

Client Name/Enterprise ID	
User Name/Contact	
Phone Number	
Fax Number	
Email Address	
Product Line – Reflection, Insight or 7i Web screens.	
IFAS Account – Test, Production, Development, etc	
Data Base – Oracle, Informix Test or Production?	
Version & Service Pack – Example: 7.6.3	
Sub System – Example: AP, AR, NU, GL, PO, PY, HR, SY, SI, EN, EO, etc.	
Priority Level – 1=System down, 2=Critical, 3=Important, 4=Inconvenient, 5=Documentation	***REQUIRED
Brief Description:	
(Attach any screen prints, error messages, tail sheets or reports)	

6. Access and View a Ticket

1. Go to the Ticket Details screen.



2. Enter the Ticket ID, or use the Search (Requery) function to locate the ticket you need.

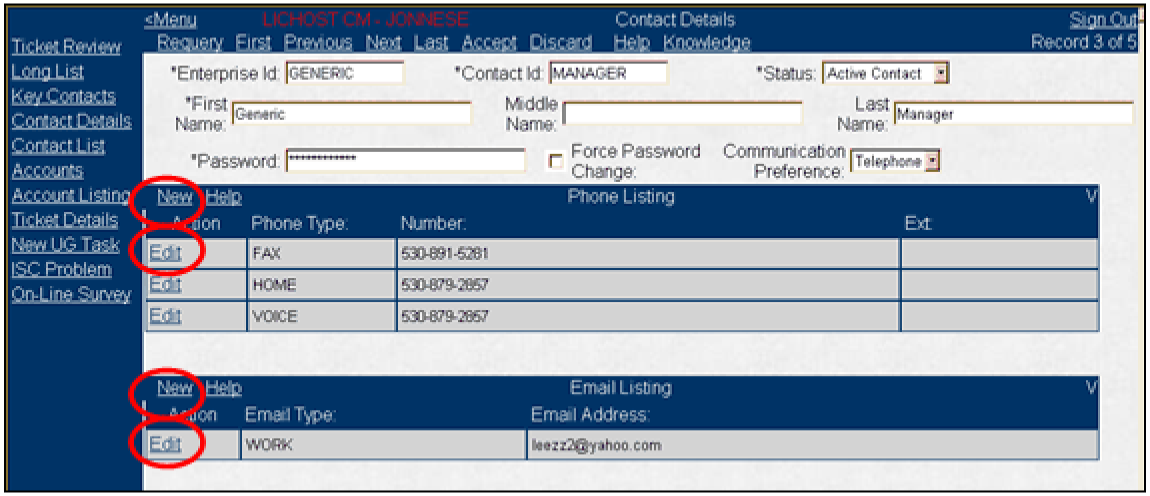
3. After finding the Ticket you're looking for, the fields will populate with any information available for this ticket.

7. View and Edit Contact Information

NOTE: This option is only available to those logged in as Managers.

1. Click on the Contact Details link.

2. Enter the Enterprise ID, or use the Search function. Once you have done so, the following type details will display:



3. You may edit existing contact information by clicking on the Edit link next to the entry you wish to modify. You may also add new contact information (such as a new phone number or e-mail address) by clicking on the New link.
4. After making your edits, click the Accept (or Discard to delete the entry) link to save the changes.

If you have questions, please contact your SunGard Bi-Tech Account Manager or the Help Desk Operators.