GLOBAL WEBINAR

OSIsoft Customer Portal FAQs and Best Practices

Presenters:
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GLOBAL WEBINAR

Hello, thanks for joining us today! A few housekeeping notes:

- This webinar is being recorded! We will be providing the recording and slides after the webinar. You can expect an email within a few days.
- There will be polling questions. Your participation is highly appreciated.
- Have a question? Use the Webex Q&A box. Answers to any unanswered questions will be posted in the documentation on my.osisoft.com.

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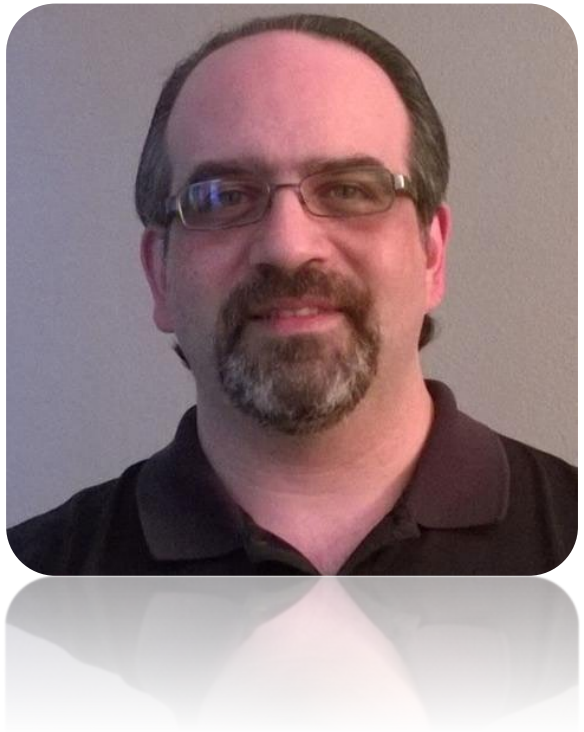
About Randy



- At OSIsoft since 2016. Currently the group lead for our customer success operations team.
- User of the PI software since 2000 originally as a controls engineer.
- Enterprise customer for 9 years prior to joining OSIsoft.

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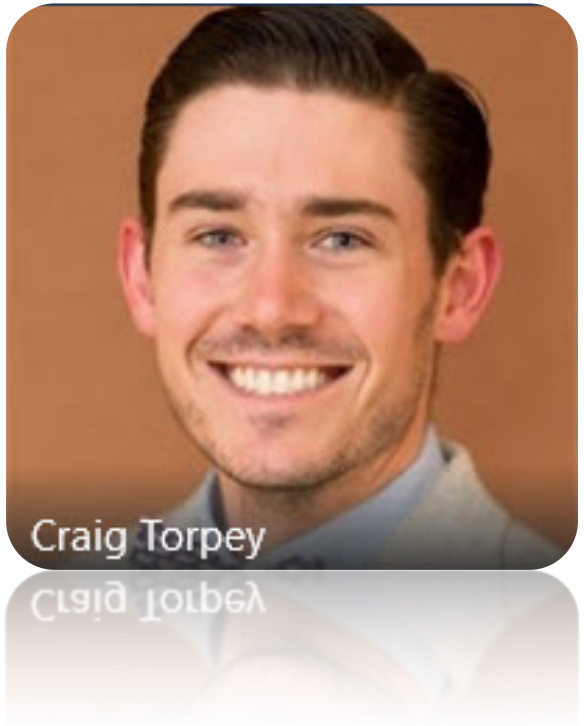
About Craig



- At OSIsoft since 2009. Currently Group lead in Technical Support
- Business owner from Technical Support for our OSIsoft Customer Portal

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Polling Question

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Polling Question

Have you logged into the OSIsoft Customer Portal?

A. Yes

B. No

C. I didn’t know about it

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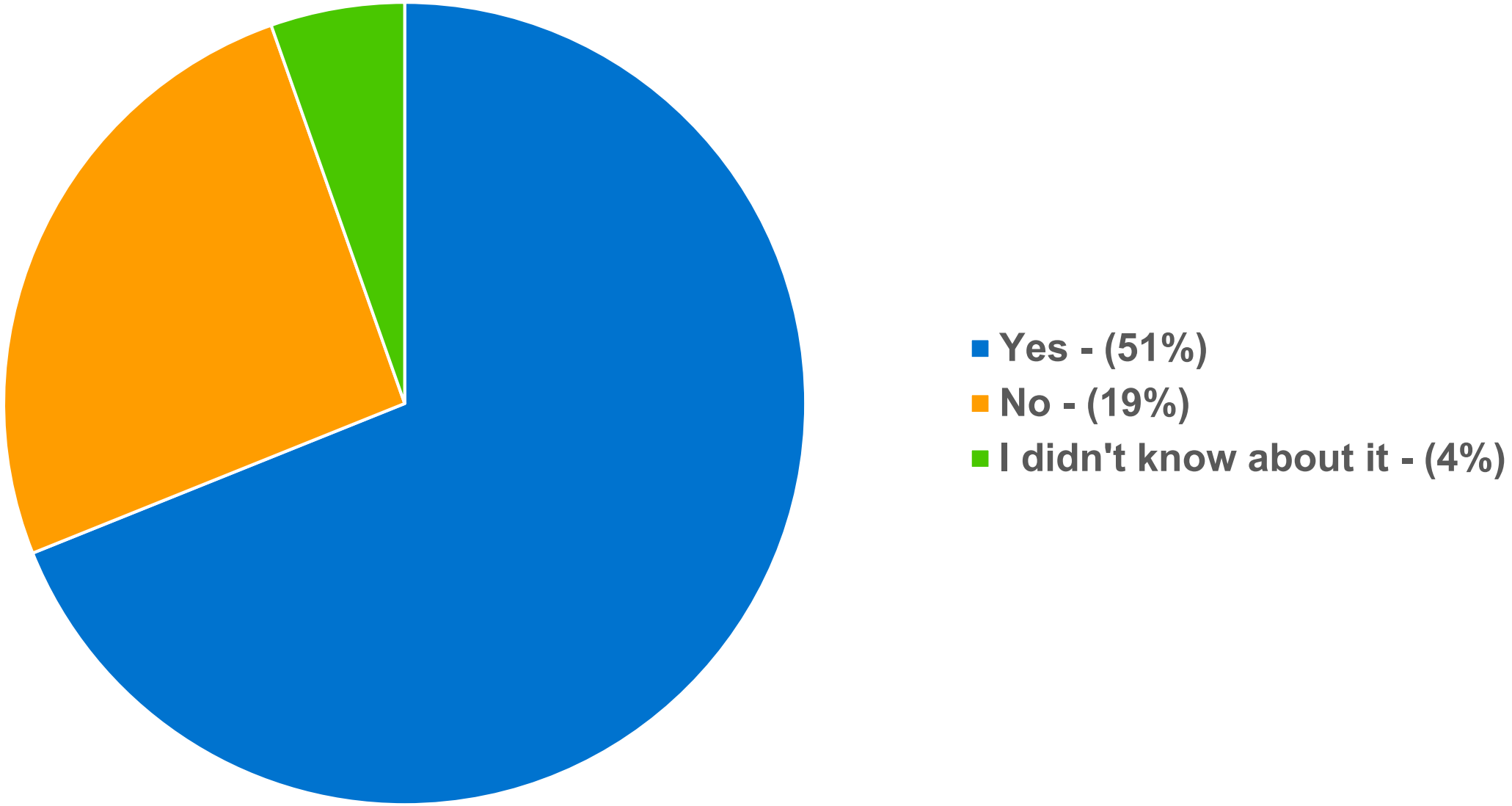
Polling Question



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myOSIsoft

Home to Your Digital Experience with OSIsoft

myOSIsoft is where you can manage your interactions with OSIsoft, all in one in place. The biggest tool in that arsenal is the OSIsoft Customer Portal where you can interact with support cases, manage who has access to support and the portal, download products and conduct integrated searches throughout OSIsoft's resources

my.osisoft.com

OSIsoft Customer Portal

Online Support Case Creation & Management

Expanded Knowledge Base

Improved Search

More than just Support

Customized Homepage

Customer User Management

my.osisoft.com

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Initial Customer Portal Statistics

3,400+
Unique Customer users have logged into the portal

190+
New external Knowledge articles created since launch

700+
Cases created by Customers on the portal

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Things that we will be highlighting.

- Homepage walkthrough
- How to search our knowledge base.
- How to download various products
  - Locations of various products
- How to find our contact numbers
- How to add users and what user profiles mean.
- Where are some items from before.

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Upfront Best Practices

- Chrome is the recommend browser
  - We have seen issues with others.
- Disable block-up blocker for site
  - If enabled, downloads will not be able to start.
- Search is the best way to find information.

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Portal Walkthrough

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Key Takeaways

- Go to https://my.osisoft.com as the hub of information and training materials
- Searching is the best way to find things on the portal
  - "Customer Portal FAQ" knowledge article has a lot of good information.
- "myOSIsoft" Feedback forum is available at https://feedback.osisoft.com
- If you have a pressing issue or are having issues logging into the portal, please call our technical support team.

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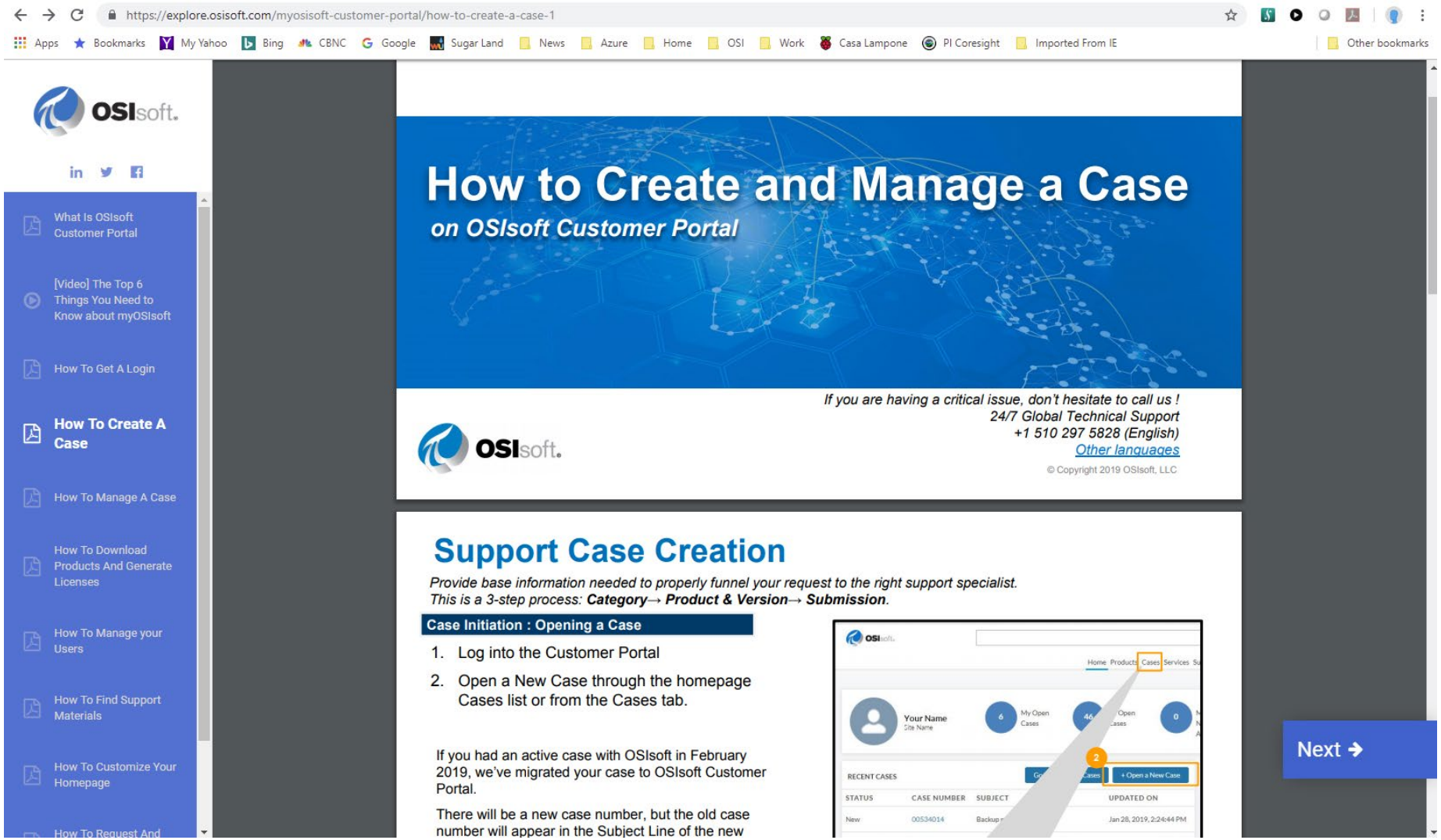
Training Materials



- Annotated walk throughs of tasks
- Translated into major languages

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Questions and Answers

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OSIsoft.
PI World
SAN FRANCISCO / APRIL 8 - 12, 2019

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OBRIGADO
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DANKON
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