

GLOBAL  WEBINAR

# OSIsoft Customer Portal FAQs and Best Practices

Presenters:

Randy Esposito, Customer Success Operations Lead, OSIsoft

Craig Torpey, Technical Support Group Lead, OSIsoft

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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](https://my.osisoft.com).

# 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.

# About Craig



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



# Polling Question





# Polling Question

Have you logged into the OSIsoft Customer Portal?

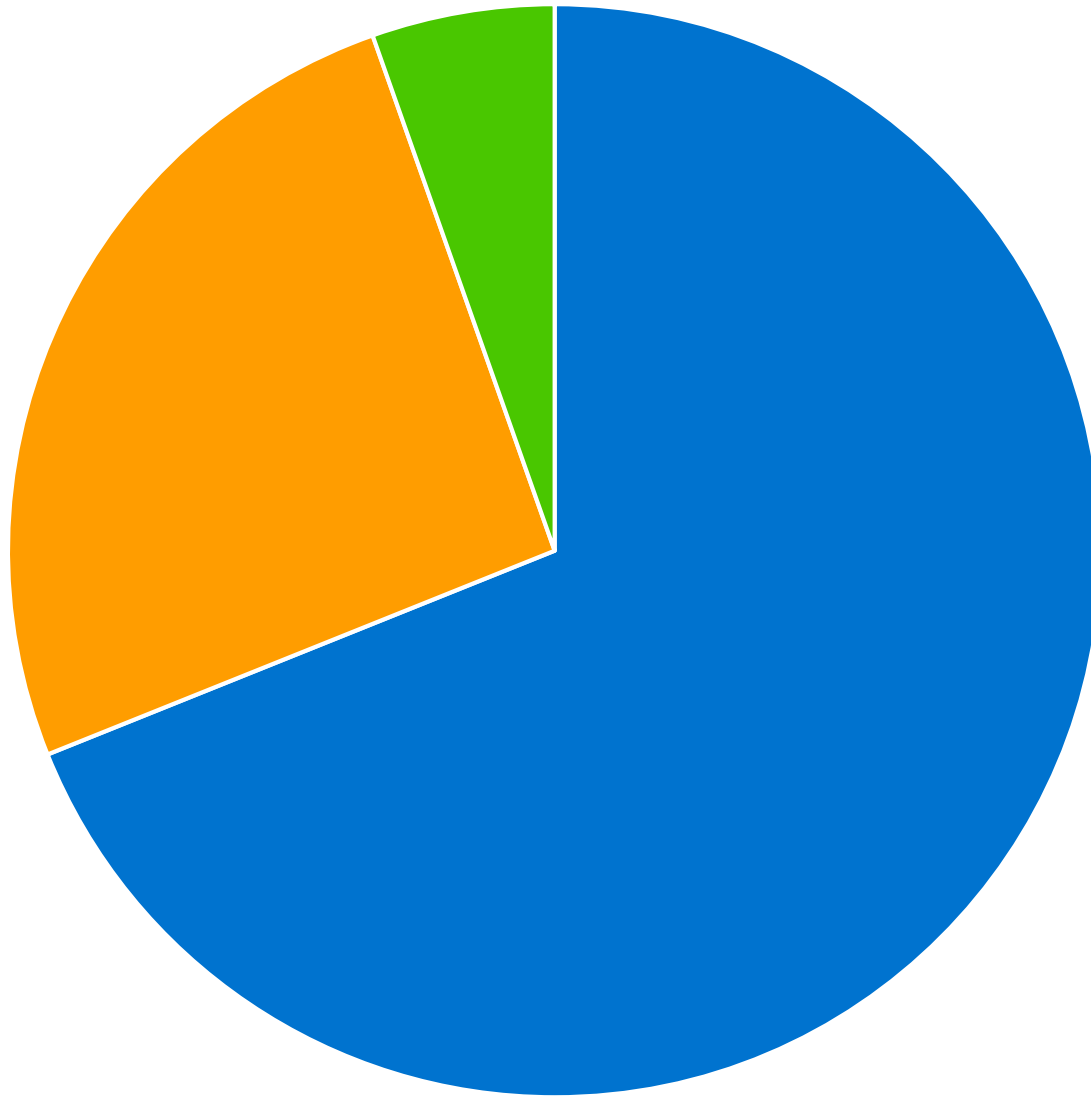
A. Yes

B. No

C. I didn't know about it



# Polling Question



- Yes - (51%)
- No - (19%)
- I didn't know about it - (4%)

The logo for myOSIsoft, featuring the text 'myOSIsoft' in a white, sans-serif font. The 'O' is significantly larger than the other letters and contains a blue circular graphic element. The background of the slide is dark blue with faint, semi-transparent images of a bar chart and a line graph, along with some blurred code snippets.

# 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](https://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](http://my.osisoft.com)**



# 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





# 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.



# 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.



# Portal Walkthrough



# 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.

# Training Materials

OSISOFT

## How to Create and Manage a Case on OSISOFT Customer Portal

If you are having a critical issue, don't hesitate to call us!  
24/7 Global Technical Support  
+1 510 297 5828 (English)  
[Other languages](#)  
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### Support Case Creation

Provide base information needed to properly funnel your request to the right support specialist.  
This is a 3-step process: **Category**→ **Product & Version**→ **Submission**.

**Case Initiation : Opening a Case**

1. Log into the Customer Portal
2. Open a New Case through the homepage Cases list or from the Cases tab.

If you had an active case with OSISOFT in February 2019, we've migrated your case to OSISOFT Customer Portal.

There will be a new case number, but the old case number will appear in the Subject Line of the new

STATUS	CASE NUMBER	SUBJECT	UPDATED ON
New	00534014	Backup p	Jan 28, 2019, 2:24:44 PM

Next →

- Annotated walk throughs of tasks
- Translated into major languages

# Questions and Answers







OSIsoft®

PIWorld

SAN FRANCISCO / APRIL 8 - 12, 2019

謝謝

KEA LEBONA

TAPADH LEIBH

고맙습니다

DZIĘKUJĘ CI

NGIYABONGA

TEŞEKKÜR EDERİM

OBRIGADO شڪرا

DANKON TANK TAPADH LEAT

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DANKIE

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MULŢUMESC

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ESKERRIK ASKO

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TEŞEKKÜR EDERİM

GO RAIBH MAITH AGAT

БЛАГОДАРЯ GRACIAS

ТИ БЛАГОДАРАМ

TAK DANKE

MAHADSANID

THANK YOU

DANKJE

ΕΥΧΑΡΙΣΤΩ GRATIAS TIBI

AČIŪ SALAMAT

MAHALO IĀ 'OE TAKK SKALDU HA

RAHMAT MERCI

HATUR NUHUN

GRAZZI PAKKA PÉR

PAXMAT CAĠA

ありがとうございました

SIPAS JI WERE TERIMA KASIH

ДЗЯКУЙ

GRAZIE

DI OU MÈSI

ĎAKUJEM

MATUR NUWUN

CẢM ƠN BẠN

WAZVIITA

FALEMINDERIT

UA TSAUG RAU KOJ

ТИ БЛАГОДАРАМ

СИПОС