



# ***Synergy***<sup>®</sup> **Technical Support Guide**



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**First Edition,  
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This edition applies to Synergy<sup>®</sup> software and all subsequent releases and modifications. This edition applies to Synergy SIS<sup>®</sup> Student Information System software and the Synergy SE<sup>®</sup> Special Education software and all subsequent releases and modifications until indicated with new editions or revisions.

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The illustrations, procedural steps, and sample reports in this manual may be slightly different from the actual software due to modifications in the software based on state requirements and/or school district customization.

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## **WELCOME**

### **Customer First - Always!**

At Edupoint, our commitment to customer support is absolute. We strive to exceed our customers' needs and expectations each and every day. We pride ourselves on providing a level of service and support that is unmatched in the K-12 SIS market. Our Customer Resource Center (CRC) support team consists of experienced, customer-centric staff members that go above and beyond to ensure your success.

## **MAINTENANCE AND SUPPORT AGREEMENT**

Your maintenance and support agreement with us allows for:

- Unlimited access to the Customer Resource Center by authorized district staff members.
  - For districts with a Basic or Premium Support Plan, the district provides its own first level support for Synergy products. Support requests from the district's school operations and district office staff are routed to the district's internal adequately staffed and competently trained student information system support group or helpdesk. Support requests that cannot be resolved by the district's internal support group are routed to Edupoint's Customer Resource Center for resolution.
  - For districts with a Direct Support Plan, Edupoint provides first level support to school operations and district office staff.
  - Edupoint provides maintenance and support services for the current version
- Participation in Edupoint sponsored user events and annual user conferences. District staff members may register for monthly webinars at <http://www.edupoint.com/SERVICES/CRCTrainingRegistration.aspx>

These Synergy training sessions are designed to introduce you to functionality that you might not be familiar with, and to enrich your understanding of and extend your use of the functionality you currently utilize. These are excellent no-cost opportunities for you and your staff to strengthen your knowledge of the entire Synergy Education Platform.

- Access to new features and functionality related to the core Synergy system.
  - Software updates include:
    - Minor extensions to existing software modules, as these are defined and released by Edupoint.
    - Enhancements, which improve the usability of existing software modules, as these, are defined and released by Edupoint.
    - New software modules representing new functionality, unless Edupoint establishes separate pricing for the licensing and maintenance of these modules.
    - Changes necessary to meet state reporting requirements as per specifications published by the respective State's authorized educational agency.
    - Changes necessary to meet federal reporting requirements as per specifications published by the authorized federal agency.
  - Edupoint provides software updates in the form of Targeted Updates, Continuous Enhancements and annual releases.
    - Targeted Updates contain only critical, time-sensitive patches such as minor fixes, enhancements, and product changes. They are provided only

to clients that require them immediately. They are installed using the ST Dashboard.

- Continuous Enhancements are released monthly to all clients and are comprised of the previous Targeted Updates along with additional patches and product changes. They are installed using the ST Dashboard.
- Annual or semi-annual releases include all functionality and major framework changes. The previous version is uninstalled before the new release is installed. The installation is managed by the installer included with the release.
- The naming convention for Edupoint’s software releases is illustrated below. Dependency is left to right. Dependent releases must be applied first.

W.X.Y.Z

W = Full release

X = Second full release (if provided) in the same calendar year

Y = Continuous Enhancement (dependent on W.X)

Z = Targeted Update (dependent on W.X.Y)

- Districts with a Premium Support Plan are provided with attendance for a designated number of district staff members at the Edupoint National Users Conference.

## **CONTACTING TECHNICAL SUPPORT**

### **HOURS OF OPERATION**

Standard support is available for Edupoint products from 6:00 AM to 6:00 PM Mountain Standard Time (Arizona) Monday through Friday. Edupoint annually provides a list of company holidays to show days when the offices are closed and standard support is unavailable. Generally, these include:

- |                    |   |
|--------------------|---|
| ▪ President’s Day  | ▪ Thanksgiving Eve (1/2 day)                                  |
| ▪ Memorial Day     | ▪ Thanksgiving (Thursday – Friday)                            |
| ▪ Independence Day | ▪ Christmas Eve (1/2 day)                                     |
| ▪ Labor Day        | ▪ Christmas Week (5 days from Christmas Day – New Year’s Day) |

## CUSTOMER RESOURCE CENTER CONTACT INFORMATION

Address:	1955 Val Vista Drive, Suite 200 Mesa, AZ 85204
Toll-free Number:	(877) 899-9111
Toll Number:	(480) 633-7300
Fax Number:	(480) 633-7301
Email address:	<a href="mailto:edupointsupport@edupoint.com">edupointsupport@edupoint.com</a>
Web site:	<a href="https://support.edupoint.com">https://support.edupoint.com</a>
Business Hours:	Monday – Friday, 6:00AM – 6:00PM (MST)

## MANAGING ISSUES

Issues may be submitted via our Customer Resource Center website using the Synergy Help Desk, or by e-mail, at any time. They may be submitted by telephone during standard support hours. Regardless of the submission method used, issues will be addressed during Edupoint's standard support hours unless an emergency exists.

Three district individuals will be authorized to contact the Edupoint CRC for assistance. If an individual, not on the authorized contact list, inadvertently contacts Edupoint, they will be referred to district support staff for assistance.

See: [Prior to reporting the issue to Edupoint's Customer Resource Center.](#)

## SUBMIT ISSUE VIA SYNERGY® HELP DESK

1. Navigate to [edupoint.com](http://edupoint.com); click **Customer Login**.



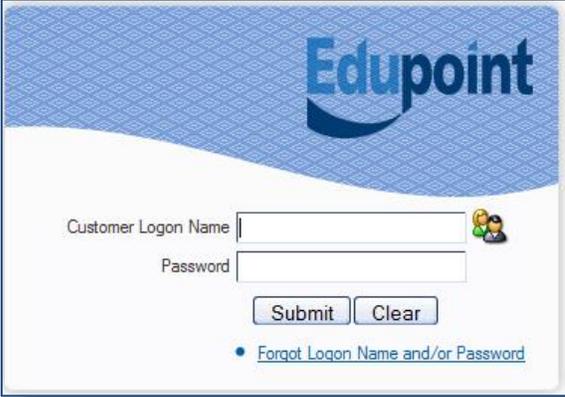
Figure 1 Edupoint Website

2. Click the purple icon.



Figure 2 Edupoint Website

3. The Support Login page displays. Enter your **Customer Logon Name** and **Password**. You will need to change your password on your first login.



Customer Logon Name

Password

[Forgot Logon Name and/or Password](#)

Figure 3 Edupoint Customer Support Login

## THE SYNERGY® HELP DESK

The Synergy Help Desk is a powerful, web-based collaboration tool designed to keep track of issues and automatically manage them to resolution.

Synergy Help Desk supports:

◆ **Tracking**

Tracking reported issues, defects, enhancement requests, etc. and managing them from beginning to end.

◆ **Workflow**

Routing and notification to get issues resolved.

◆ **Status**

Up-to-the-minute status information to foster better communication and collaboration.

◆ **Customer Integration**

Self-service customer support, providing detailed ticket descriptions and answers to issue activity using a customer dashboard that simplifies school district IT management.



*Figure 4 Synergy  
Help Desk PAD Tree*

Synergy Help Desk was created using the same interface design and functionality already present in our Synergy Education Platform products. This makes learning how to use Synergy Help Desk familiar and easy.

## CUSTOMER DASHBOARD SCREEN

The Customer Dashboard screen displays district issues that are categorized based upon ticket status: Open, Active, Pending, and Closed. If your office supports many districts, all of those districts and their issues display. The District Name column provides a sort option.

On any tab, the **Ticket Number** or **Title** link opens the Ticket screen for more detail on the issue.

### OPEN TICKETS TAB

The Open Tickets tab displays details of all of the district's open issues. The issues may be sorted by the date Modified, the Status, Sub Status, Ticket Number, Product, Module, Feature, and District Name.

A Sub Status in orange is a reminder that Edupoint needs the district to reply to proceed with any work on the ticket.

Customer Dashboard											
<span style="border: 1px solid red; padding: 2px;">Open Tickets</span> <span style="margin-left: 10px;">Active Development</span> <span style="margin-left: 10px;">Pending Development</span> <span style="margin-left: 10px;">Closed Tickets</span>											
<span style="color: orange;">■</span> Any 'Sub Status' values in <b>Orange</b> are waiting for customer feedback.											
District Issues											
Line	Modified	Status	Sub Status	Ticket Number	Title	Description	Product	Module	Feature	District Name	
1	09/26/2013 12:10:00	Open	Design Document Pending Sign Off	<a href="#">200106</a>	<a href="#">This is an Example Customer Entered Ticket</a>	This is an Example Customer Entered Ticket	Mobile Apps	TeacherVUE		Edupoint School District	
2		Open		<a href="#">49149</a>	<a href="#">STU202 report taking a long time to run</a>	STU202 - Student Schedule Report still running after 4 minutes.	Synergy SIS	Schedule		Edupoint School District	
3		Open		<a href="#">63860</a>	<a href="#">Security for Office Staff</a>	Wants secretaries to have view of whole district but only update to their school.				Edupoint School District	

Figure 5 Customer Dashboard Screen Open Tickets Tab

### ACTIVE DEVELOPMENT TAB

The Active Development tab displays:

- **Tickets With Activity In Last 5 Days** - tickets that have had support or customer activity within the last five days.
- **District Issues Targeted for Development** - district issues in development, and targeted for release.

Customer Dashboard									
Open Tickets		Active Development		Pending Development		Closed Tickets			
Tickets With Activity In Last 5 Days									
Line	Activity Date	Activity Time	Ticket Number	Title	District Tracking Number	District Name			
1	09/17/2013	11:50 AM	128660	This is an Example Customer Entered Ticket		Edupoint School District			
2	09/17/2013	1:55 PM	115121	ADM475 & ADM675-will not give result in text format		Edupoint School District			
3	09/17/2013	2:20 PM	2553	SAIS Error on Students with multiple transactions		Edupoint School District			
District Issues Targeted for Development									
Line	Target Date	Release Name	Ticket Number	Title	Description	Product	Module	Feature	District Name
1	09/17/2013	Example release	200106	This is an Example Cu	This is an Example Cu	Mobile Apps	TeacherVUE		Edupoint School District
Known Issues Targeted for Development									
Line	Target Date	Release Name	Ticket Number	Title	Description	Product	Module	Feature	District Name
1	08/08/13	8.0	9	Show for all customers	My Description	Synergy SIS	Attendance		Class Daily Attendance

Figure 6 Customer Dashboard Screen Active Development Tab

Nearly all the columns may be sorted except for the Title and Description fields.

- And **Known Issues Targeted for Development** - these provide the district with additional information that might be beneficial to understanding their own issues.

### PENDING DEVELOPMENT TAB

The Pending Development tab lists district issues in development, but not targeted for release.

Customer Dashboard								
Open Tickets		Active Development		Pending Development		Closed Tickets		
District Issues in Development, but not targeted for Release								
Line	Modified	Ticket Number	Title	Description	Product	Module	Feature	District Name
1		42067	Absences not showing up on the TVUE screen	Customer says that teacher is taking attendance and attendance is recording, but is not coming up on the student's picture as absent.	Synergy SIS	Attendance		Edupoint School District
2		70891	Error when running update grades	Error when running update grades. student has been moved from one PE course to another.	Synergy SIS	Grading		Edupoint School District
3		82528	LDAP Monitor	Client cannot get the LDAP monitor to connect, saying password is invalid.				Edupoint School District

Figure 7 Customer Dashboard Screen Pending Development Tab

## CLOSED TICKETS TAB

All of the district's closed tickets display on the Closed Tickets tab.

Customer Dashboard								
<a href="#">Open Tickets</a> <a href="#">Active Development</a> <a href="#">Pending Development</a> <a href="#">Closed Tickets</a>								
Closed Tickets								
Line	Modified	Ticket Number	Title	Description	Product	Module	Feature	District Name
1		<a href="#">47163</a>	<a href="#">ATP403 - Show perfect attendance for continuation</a>	Need ATP403 to have ability to show perfect attendance for continuation if student enrolled for 15 hours a week or max amount available for the week.	Synergy SIS	Attendance		Edupoint School District
2		<a href="#">60514</a>	<a href="#">ELL Assessment not saving data</a>	English Language Learners Assessment not saving data	Synergy SIS	Student Programs		Edupoint School District
3		<a href="#">70855</a>	<a href="#">Music grades not showing when transfer to report</a>	Music grades are not showing when transferring to report cards	Synergy SIS	Grade Book		Edupoint School District

Figure 8 Customer Dashboard Screen Closed Tickets Tab

**CUSTOMER TICKET SCREEN**

**Customer Ticket**

Ticket Number: **200110** Title: **Report cards need to included concurrently enrolled grades** District Name: **Edupoint School District**

**Description** Activity Documents

Ticket Number	Title	District Tracking Number
200110	Report cards need to included concurrently enrolled grades	

Status: **Open** Product: **Synergy SIS**

Sub Status: **New/Unassigned** Module: **Grading**

Priority: **High**

Description: **GRD208 needs to include grades taken at concurrently enrolled schools.**

Steps To Repeat:

School: Columbus Beta  
 Student: Billy Abbott  
 User: John Smith

Steps to follow:

- Billy Abbott is enrolled concurrently at Columbus Beta and Hope High Schools.
- Run GRD208 from Columbus Beta or run GRD 208 from Hope High School.

Result, GRD208 only includes grades from school in focus.

Expected result: GRD208 needs to include grades taken at concurrently enrolled schools.

Figure 9 Customer Ticket Screen Description Tab

**DESCRIPTION TAB**

The Description tab includes the Ticket Number, Title, District Tracking Number - optional for districts that have their own system, Status, Sub Status, Priority, Product Module, Feature, Description, and Steps To Repeat.

- **Priority** - Critical, High Medium, or Low
- **District Tracking Number** - This is optional for districts that have their own system.
- **Product** - Grade Book, Mobile Apps, Offline Applications, ParentVUE/StudentVUE, Synergy SE, Synergy SIS, TeacherVUE
- **Module** - This field becomes active once Product is selected.
- **Feature** - This field becomes active once Module is selected.
- **Found in Version** - Select the version number where this problem occurred.
- **Found in Environment** - Select the environment where this problem occurred.

When the ticket is targeted for a release, this information displays at the bottom. The **Target** and **Release Dates** may be sorted ascending and descending.

Line	Release Name	Target Date	Release Date	Status
1	8.0.1.3 TU	06/07/2013		
2	8.0.2 CE	06/28/2013		

Figure 10 Customer Ticket Screen Description Tab Release Targets

When the ticket has closed, information about the **Resolution** displays at the bottom.

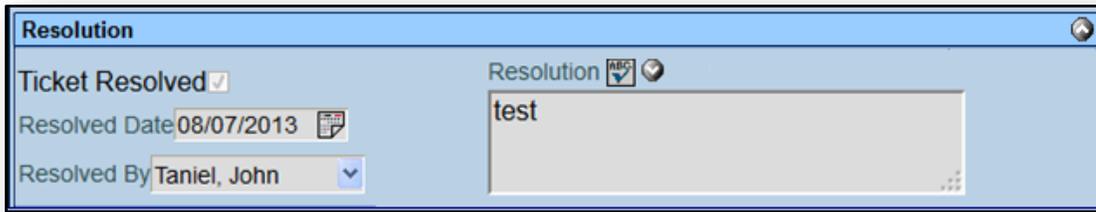


Figure 11 Customer Ticket Screen Description Tab Resolved Issue

### ACTIVITY TAB

The Customer Ticket Activity tab keeps track of the actions applied to a ticket, from Edupoint support service and from the district that submitted the issue. These are Items such as a note describing a status change or an email. The most recent activity displays first by default.

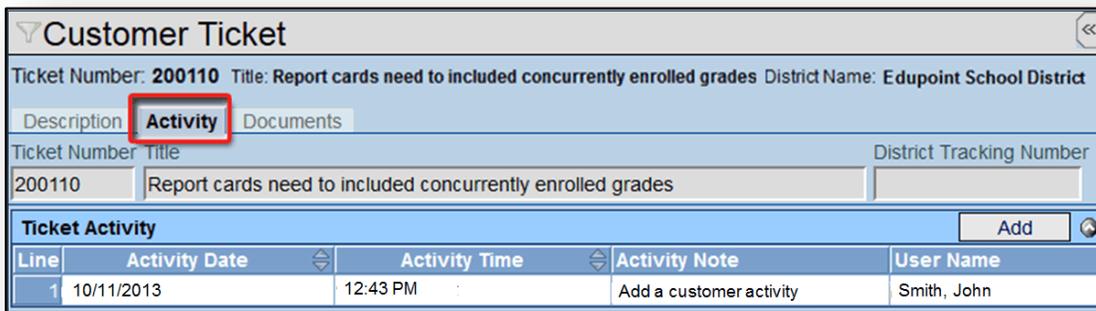


Figure 12 Customer Ticket Screen Activity Tab

The information includes the Activity Date, Activity Time, Activity Note, and the user who created the activity. The Activity Date and Time may be sorted ascending and descending.

To add an activity,

1. Click **Add** on the Ticket Activity grid. The Customer ticket Activity Add screen opens.
2. The **Activity Date** and **Activity Time** are auto-populated, mandatory fields that may be edited.
3. Enter an **Activity Note**, if desired.
4. Click **Save**. The activity displays on the Ticket Activity grid of the Activity tab.

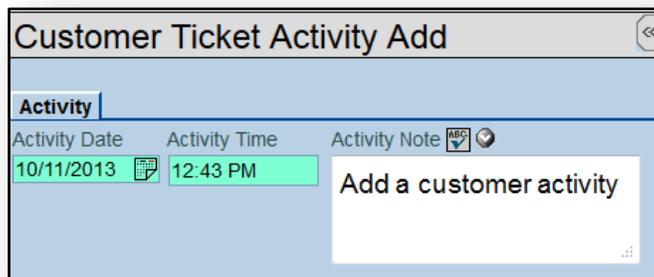


Figure 13 Customer Ticket Activity Add

## DOCUMENTS TAB

Any additional documents or screenshots relating to the ticket may be added and accessed on this tab. Documentation can be in the form of images, spreadsheets, PDFs, Word, or text files.

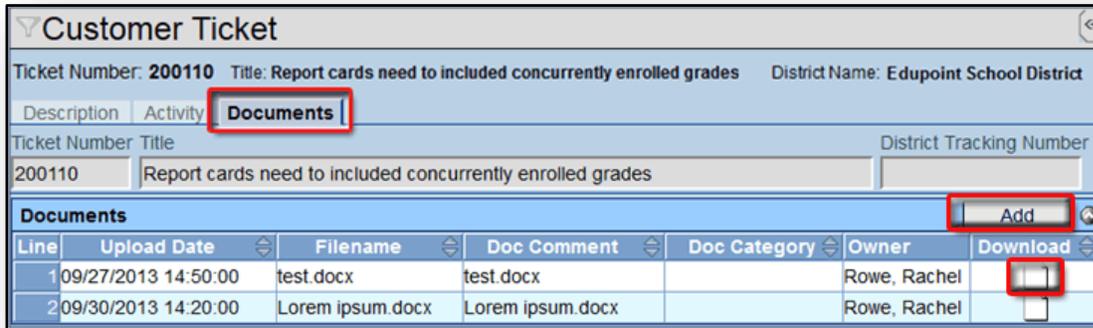


Figure 14 Customer Ticket Screen Documents Tab

- Click the icon in the Download column to view an attached document.

To add a document:

- Click **Add** on the Documents bar. The Attach document screen opens.

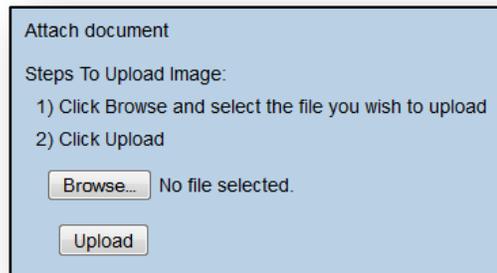


Figure 15 Attach Document Screen

- Click **Browse** and select the file to upload. The title of the document displays on the screen.
- Click **Upload**. A message displays that the upload was successful.
- Click **OK**. The document information displays on the Documents grid.

## CREATE A TICKET

The Customer Ticket Add screen provides an easy and efficient way to submit an issue.

1. Navigate to the Customer Dashboard or Customer Ticket screen.

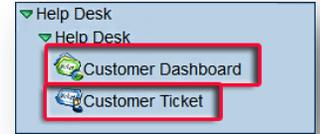


Figure 16 Synergy Help Desk PAD Tree

2. From the Customer Dashboard screen, click **Add Ticket** or from the Customer Ticket screen click **Add**. The Customer Ticket Add screen opens.

Figure 17 Customer Ticket Screen

3. Enter a **Title** and **Description**. The Status and Sub-status fields are auto-generated.

Figure 18 Customer Ticket Add Screen

4. Complete the **Steps to Repeat** to recreate the issue. Explain how to reproduce the problem.

Figure 19 Customer Ticket Add Screen Steps to Repeat

5. Complete all other known information.

- **Priority**

Critical, High, Medium, or Low

- **District Tracking Number**

*This is optional for districts that have their own system.*

- **District Location**

If your office manages several districts, select the district where the issue occurred.

- **Product**

Grade Book, Mobile Apps, Offline Applications, ParentVUE/StudentVUE, Synergy SE, Synergy SIS, TeacherVUE

- **Module**

This field becomes active once Product is selected.

- **Feature**

This field becomes active once Module is selected.

- **Found in Version**

Select the version number where this problem occurred.

- **Found in Environment**

Select the environment where this problem occurred.

Figure 20 Customer Ticket Add Screen Other Known Information

If this issue is needed by a specific date, please complete the following. This information is meant to inform scheduling decisions and does not guarantee any specific delivery.

6. Enter the **Required by Date** (MMDDYY) or click and select date.

7. Enter the **Business Justification**. Use to spellcheck. Use for more space.

8. Click . The Ticket Add screen closes. The former screen displays.

Figure 21 Customer Ticket Add Screen Business Needs

## ISSUE RESPONSE TIME

Issues will be responded to within four hours during Edupoint’s standard support hours. Issues submitted outside of these hours will be responded to by 10:00 AM Mountain Standard Time (Arizona) on the next available standard support day. All issues will be worked with due diligence and resolved as quickly as possible. Due to variances in all issues, a standard resolution timeframe is not available. Issue status can be tracked online and Edupoint will keep you informed of progress in a reasonable manner and timeframe.

Support outside of standard support hours will be available for urgent issues with the production environment only.

You should notify Edupoint, during standard support hours, prior to performing significant system events, which could potentially create a critical issue with the production environment. This notification should occur at least two (2) days prior to the event when possible. Edupoint will then ensure appropriate staff is available to assist if necessary. When this notification is received, a separate contact number will be provided to reach on-call staff in the event an issue occurs.

### EMERGENCY ISSUES

You can reach a Customer Resource Center Specialist after hours if you experience a high severity issue with your production environment.

A high severity issue is one in which one of these conditions exist:

- You are unable to use any of the functions in the system.
- The Synergy system locks up or users are exited from the system.
- An application fails to launch.
- The issue contributes to data corruption or loss.

To reach a specialist after hours, call the CRC number, and follow the prompts as directed.

### SUBMITTING ENHANCEMENTS REQUESTS

You can submit an enhancement request by completing the appropriate form found in the Enhancement Requests folder within the Documentation folder on the [FTP](#) site. The form must be attached to a support request.

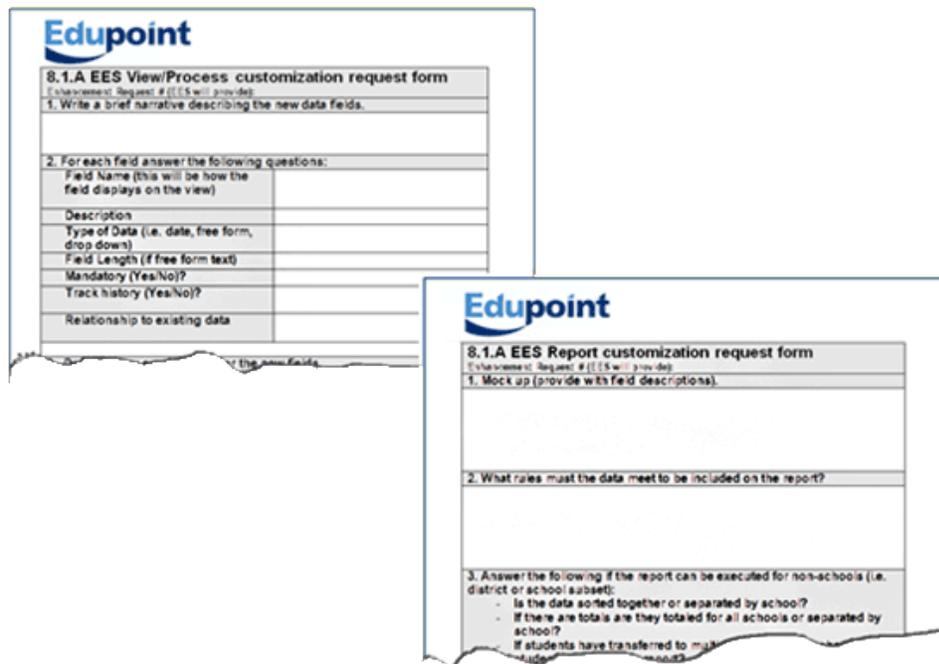


Figure 22 Enhancement Request Forms

- Navigate to [ftp.edupoint.com](http://ftp.edupoint.com).
- Open the Documentation folder and then the Enhancement Requests folder.
- Once the form is filled out, [create a ticket](#), and [attach the form](#) to the ticket.

## **RELEASE MANAGEMENT SERVICES**

If you have contracted with us for Release Management services, we will apply all software updates to your system for you. These updates will be applied during off-hours to minimize any disruption to your end users.

When an update is available, the CRC Specialist assigned as your release manager will contact you to schedule a time to upgrade your system. He or she will install updates in your test and production environments when it is convenient for you. Your release manager will notify you after your system is updated and he or she will call out critical changes and any modifications you must make based on the new functionality.

## **CUSTOMER RESOURCE CENTER TOOLS**

Our Customer Resource Center also maintains various tools that allow us to provide the help you need, including:

- VPN connectivity to your system, allowing our staff hands-on access to troubleshoot your issues.
- GoToMeeting sessions for live demonstrations as well as the ability for our client districts to walk our staff through complex issues.
- Client test environments where Edupoint staff can test fixes, patches, and releases on actual client data, thus reducing the chance of problems when updates are released.

## **MAKING THE MOST OF SUPPORT**

To help us help you:

- Ensure district users are properly trained in the use of your Synergy products.
- Ensure district support staff has adequate training to be able to help district users.
- Keep the district current with the latest version of your Synergy products by upgrading when software releases are made available. These include targeted updates, continuous enhancements, and major releases.
- Ensure the district support staff thoroughly reviews the Release notes and Edupoint Technical Notifications (ETNs) and prepares for any changes that may affect the district implementation with each release.
- Make sure the users receive 'update' training after new releases are installed and refresher training for processes that occur annually such as Scheduling.
- Ensure the Edupoint Customer Resource Center has direct access to the district database(s) for support.
- When an error or problem does occur collect accurate and thorough information from the users with respect to what they were doing at the time, exactly what steps they took, and what they experienced. Attempt to troubleshoot the problem and see if you can reproduce it at the district, or in other schools.

## **PRIOR TO REPORTING AN ISSUE TO EDUPOINT'S CUSTOMER RESOURCE CENTER:**

- Investigate

- What needs to be accomplished?
  - What is occurring?
  - When did it start?
  - Does it only occur during certain times of the day?
  - Does it happen for all students/teachers/users?
  - Does it happen on all machines/logins/operating systems/browsers?
  - What is different or has changed from the last time this worked? (Installed a patch, new permissions, different filters, network differences?)
  - What is the same as the last time this worked? (Same user, same computer, same focus school?)
  - What has already been done to address the issue prior to calling?
  - Replicate
    - Does it only happen on the same screen or across different screen?
    - Does it only occur at the same time of day or at different times?
    - Does it happen for the same student/teacher/user or for any student/teacher/user?
    - Does it only occur in a particular environment: test, training, live or any environment?
  - Escalate (if necessary)
    - To others within your organization
    - To Edupoint, if the issue cannot be resolved internally
  - Resolve
    - Through education
    - Modify setup
    - Change business process
    - Software modification
    - Hardware update/upgrade
  - The incident documentation should be as detailed as possible.
  - The incident documentation must capture the description of the issue and the history of work done to resolve it.
  - Escalate issues you are unable to resolve to Edupoint's Customer Resource Center by submitting a ticket to the Synergy Help Desk. Ensure you provide a thorough report of the problem and a clear description of what occurred and when. Report all steps taken to troubleshoot the problem including the steps to taken to reproduce the issue. Attach any screen shots etc. to the incident record.
- In addition, Edupoint recommends that you:
- Attend the annual Users' Conference and post-conference training sessions to keep abreast of enhancements to the Synergy product line.
  - Attend monthly online training sessions focused on timely topics throughout the school year.

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