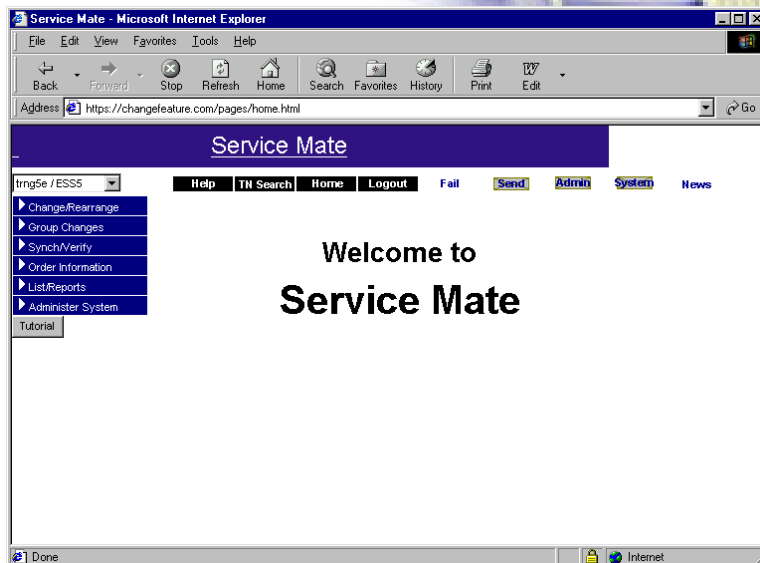


Getting Connected:

A Guide to Setting Up and Using Service Mate with Dial-up Connections



Welcome to Getting Connected

Getting Connected is your Service Mate startup resource to quickly and easily begin using Service Mate.

Getting Connected helps you:

- Set up Service Mate for the first time.
 - Specifically...
 - Preparing to set up your Service Mate connection
 - Setting up your browser to minimize errors and capitalize on Service Mate's best features
 - Connecting to and logging into Service Mate
- Set up Service Mate on a new computer system or an upgraded connection.
- Gain helpful hints on getting the most out of Service Mate — from key features of Service Mate to adapting Service Mate information for your own reports.
- Find out where to get more help.

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Key Navigation Features of this Guide (Electronic Version)

If you are using the electronic version of this guide in Adobe Acrobat, the information below walks you through the navigation features we've included to help you make your way around.

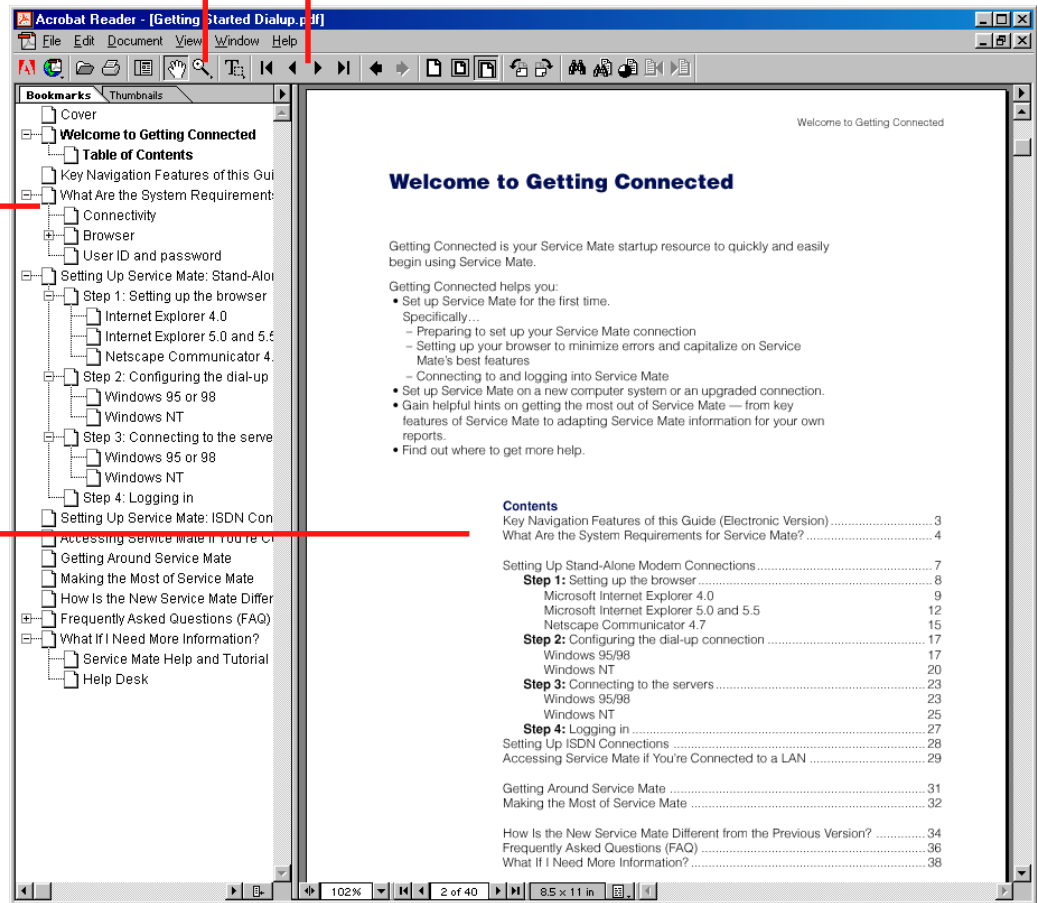
Use the zoom tool to magnify a particular area.

Use the front and back arrows to move page by page.

Use bookmarks to find what you're looking for.

The contents page also has links for the entire document. Find helpful links scattered throughout the guide.

Look for links to outside sites to help you even more.



Downloading Adobe Acrobat Reader

If you have a printed version of this guide and you'd like to use the electronic version, you'll need Adobe Acrobat Reader. To download this program for free, go to www.adobe.com/products/acrobat/readstep.html and download the appropriate version (most likely, the latest edition of Reader, English version). Adobe Acrobat Reader allows you to open and view files saved in .pdf format.



What Are the System Requirements for Service Mate?

Use this information to prepare to use Service Mate.

You need the following to run Service Mate:

- 200 MHz Pentium PC
- 64 megabytes RAM
- 20 megabytes free hard disk space
- Microsoft Windows operating system
 - Windows 95/98 (does not support Windows ME)
 - Windows NT 4.0 with Service Pack 3 or better
- 17-inch or greater monitor with 1024x768 resolution is strongly recommended (However, Service Mate will function on a 14- or 15-inch monitor with 800x600 resolution.)

Connectivity

We recommend accessing Service Mate over your existing Internet connection. If this is possible for you, *Getting Connected: A Guide to Setting Up and Using Service Mate over the Internet* provides instructions for connecting to Service Mate over the Internet.

However, you can also access Service Mate over these connection types. How you set up Service Mate depends on the type of connection you have.

- **Stand-Alone Modem** ... see page 7
Analog connection with direct dial-out capabilities at up to 56 kbps
- **ISDN** ... see page 28
ISDN B-channel connection
- **Accessing Service Mate If You're Connected to a LAN** ... see page 29

Some users may not know their connection type. If you are unsure, and can't ask your IT professional, use these clues to help determine your connection.

- Do you have to dial out to access the Internet? If so, you may have a stand-alone modem connection *or* an ISDN connection. Check with your office manager or phone system administrator, or take a look at your telephone bill to find out.
- Do you have a logon screen with a user name/password when you turn on your computer at work? If so, you are most likely on a LAN connection.
- Do you have one phone line that carries your telephone *and* your Internet access? If so, you may have an ISDN connection.



About connectivity

Most Service Mate users without Internet access will use a stand-alone modem connection.

Browser

You need one of these browsers to view Service Mate. For more information on setting up your browser for Service Mate, see page 8. You also need to make sure your browser has 128-bit encryption and is set up to accept cookies.

- **Internet Explorer (version 4.0, 5.0 or 5.5)**

We recommend using Internet Explorer with Service Mate because it gives you greater functionality. Newer versions of Internet Explorer may also work with Service Mate. You can download the latest version of Internet Explorer for free by pointing your browser to www.microsoft.com/windows/ie and following the instructions. Note: Depending on your connection, it may take an hour or more to download the browser.

- **Netscape Communicator 4.7**

Visit www.netscape.com/download to download a copy of Netscape Communicator. Note: Note: We do not recommend using Netscape Communicator 6.0 with Service Mate as it is new, and Service Mate has not been tested on it.

To ensure security, Service Mate requires that your browser is equipped with strong, 128-bit encryption. Before beginning set up, check the level of encryption on your browser.

For Internet Explorer, launch your browser and choose Help>About Internet Explorer. You will see a screen similar to the one on the right. If the screen indicates a cipher strength of less than 128-bit, then check with your IT professional for a 128-bit compliant update, or visit the Microsoft site listed above for the latest version of Internet Explorer. The latest versions of Internet Explorer have 128-bit encryption by default.

Netscape Communicator 4.7 has 128-bit encryption by default. Unless you or your company has changed Communicator's encryption settings, the browser most likely has the appropriate encryption. Should you experience difficulty using Service Mate with Netscape Communicator, enlist the help of your IT professional to check/reset the encryption settings.

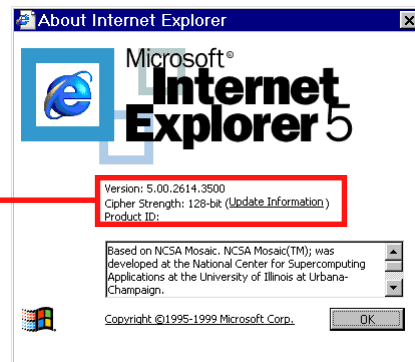
A note about cookies

Several important features of Service Mate, including Help and Tutorial, use cookies to function correctly. We realize that some users are hesitant to set their browser to accept cookies. Service Mate uses cookies for screen management and navigation only. Rest assured, no personal information is placed into a cookie by Service Mate. You can feel comfortable setting your browser to accept cookies while you're using Service Mate.

If you're concerned about cookies, be sure to reset the cookie setting when you access sites other than Service Mate.



Netscape Communicator



User ID and password

In addition to the above requirements, you need a user ID and password to access Service Mate. As an existing user, you have already been assigned a user ID and password. These restrictions apply to the user ID/password:

- Each user needs a separate user ID and password. You cannot share IDs and passwords. For additional user IDs and passwords, contact your account representative.
- To maintain the security of the system, each user is asked for a new password every 60 days. On or around the 60th day, the system will let you know at login that your password has expired. You will then be asked to enter a new one. This new password will be effective for 60 days. This procedure is automatic. If you don't change your password when prompted, you'll need to call the help desk for a new one.

Setting Up Service Mate: Stand-Alone Modem Connection

Many users will access Service Mate using a stand-alone modem connection, that is, a PC with an analog modem, not connected to a LAN. This section takes you through a four-step process from setting up to logging on to Service Mate on a stand-alone modem. If you follow these instructions, you should have little trouble setting up and beginning to use Service Mate.

It is important to know what version of Windows your computer uses. Steps 2 and 3 give instructions for Windows 95 or 98 and Windows NT.

Step 1: Setting up the browser

With the new Service Mate, you need a browser. This section walks you through the optimal Service Mate setup for your browser.

- Internet Explorer 4.0
- Internet Explorer 5.0 and 5.5
- Netscape Communicator 4.7

Step 2: Configuring the dial-up connection

This section guides you through the preliminary configuration that allows you to dial out to Service Mate.

- Windows 95/98
- Windows NT

Unsure of your connection type?

See page 4 for some helpful hints in determining your connection.

Step 3: Connecting to the servers

This section shows you how to connect to the servers.

- Windows 95/98
- Windows NT

Step 4: Logging in

This section walks you through logging on to Service Mate. After you've completed Step 4, you're ready to use Service Mate.

If you are setting up Service Mate using an ISDN modem, see page 28 for ISDN setup instructions. For a LAN, see page 29 for LAN setup instructions.

Step 1: Setting up the browser

Service Mate's new graphical user interface (GUI) requires a browser with 128-bit encryption (see page 5). Service Mate supports the three browsers listed below. To begin setup, turn to the appropriate page for your browser.



Internet
Explorer

Internet Explorer 4.0 p. 9

Internet Explorer 5.0 and 5.5 p. 12

Netscape Communicator 4.7 p. 15



Netscape
Communicator

Optimized for Internet Explorer

Internet Explorer is the recommended browser for Service Mate because it gives you greater functionality. You can download the latest version of Internet Explorer for free by pointing your browser to **www.microsoft.com/windows/ie** and following the instructions.

Note: Depending on your connection, it may take an hour or more to download the browser.

Internet Explorer 4.0

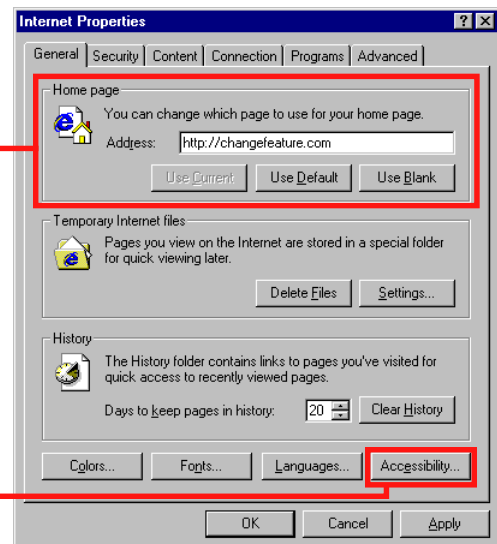
Before you begin, confirm that your browser has 128-bit encryption as described on page 5.

From the Start menu in the lower left corner of your screen, select Settings>Control Panel. Find “Internet” and double-click the icon.



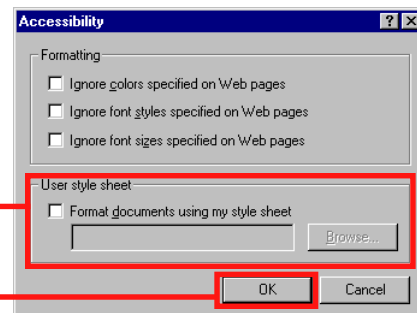
You will see the “Internet Properties” screen.

If you access Service Mate often, or if you use your browser solely to access Service Mate, you may wish to change your home page to the Service Mate address. With your home page on Service Mate, your browser will automatically open to Service Mate when you open your browser. To change the home page, simply type **http://changefeature.com** in the “Address” field.



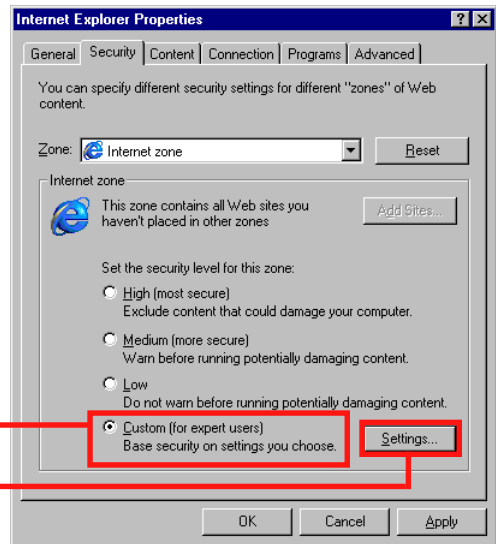
From the “Internet Properties” screen, you’ll need to check the style sheet settings. Click the “Accessibility” button.

On the “Accessibility” screen, make sure the “Format documents using my style sheet” checkbox is unchecked. This ensures that Service Mate is displayed correctly.



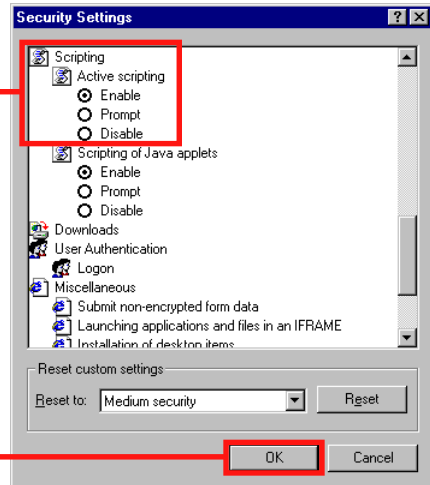
Click “OK” to return to the “Internet Properties” screen.

Click the "Security" tab. This brings the "Security" screen to the front.



Select "Custom."

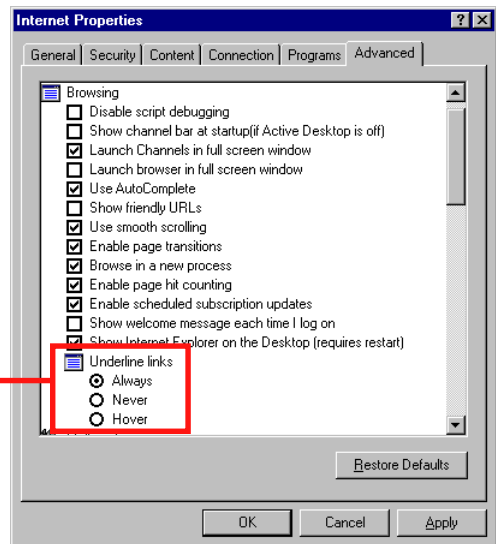
Click on "Settings" to bring the "Security Settings" screen to the front.



Scroll down to "Active scripting." Make sure active scripting is enabled by clicking the "Enable" radio button.

Click "OK" to return to the "Internet Properties" screen.

Click the "Advanced" tab. This brings the "Advanced" screen to the front.



Scroll down to "Underline links" and make sure "Always" is selected. If not, click once to select.

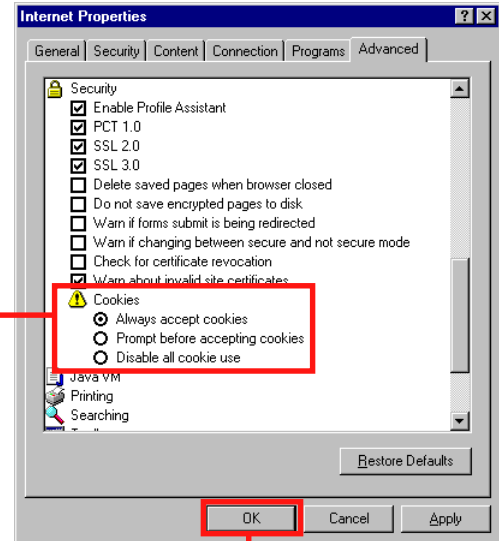
Scroll down to the “Cookies” heading and select “Always accept cookies.”

Cookies and security

See page 5 for important information on accepting cookies.

Note that, as in this example, there may be other properties already checked. This is normal, so don't change any other settings than the ones specified here. Click “OK” to save your changes.

Congratulations! Internet Explorer is now configured to support Service Mate with a stand-alone modem connection. You can now move to Step 2 on page 17.



Internet Explorer 5.0 and 5.5

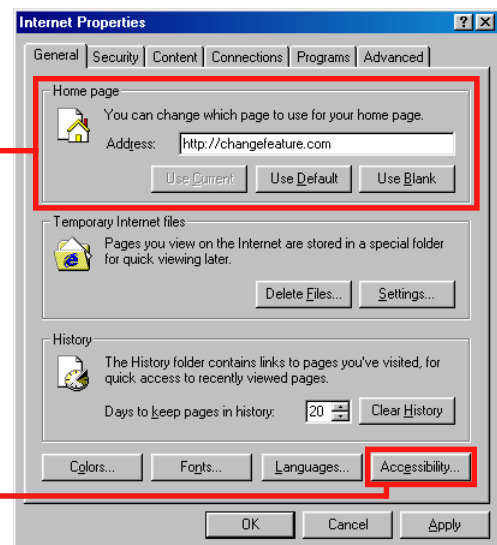
Before you begin, confirm that your browser has 128-bit encryption as described on page 5.

From the Start menu in the lower left corner of your screen, select Settings>Control Panel. Find “Internet Options” and double-click the icon.



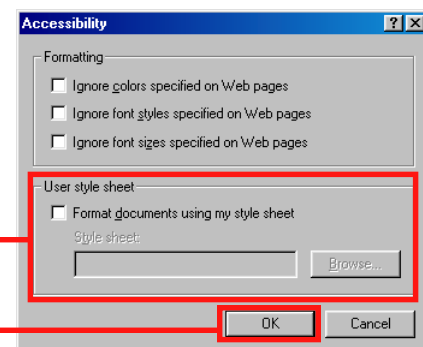
You will see the “Internet Properties” screen.

If you access Service Mate often, or if you use your browser solely to access Service Mate, you may wish to change your home page to the Service Mate address. With your home page on Service Mate, your browser will automatically open to Service Mate when you open your browser. To change the home page, simply type **http://changefeature.com** in the “Address” field.



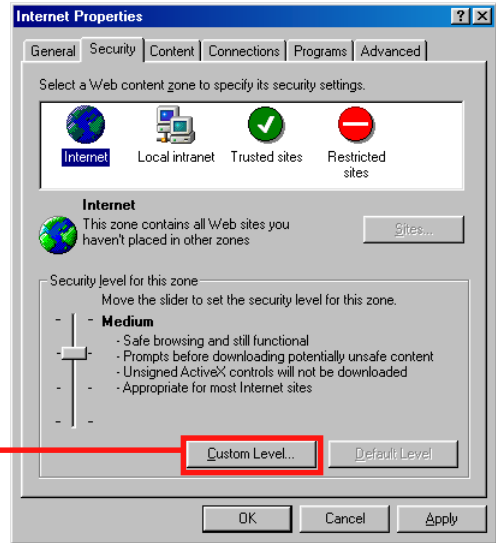
From the “Internet Properties” screen, you’ll need to check the style sheet settings. Click the “Accessibility” button.

On the “Accessibility” screen, make sure the “Format documents using my style sheet” checkbox is unchecked. This ensures that Service Mate is displayed correctly.



Click “OK” to return to the “Internet Properties” screen.

Click the "Security" tab. This brings the "Security" screen to the front.

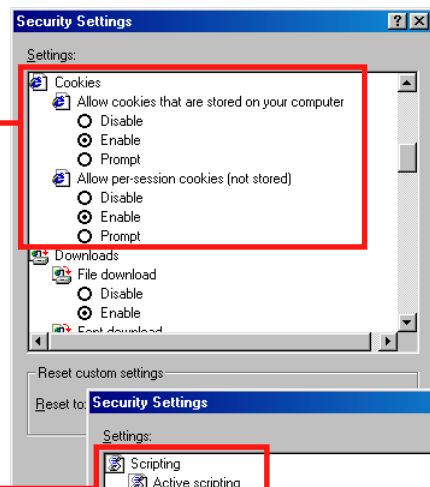


Click "Custom Level" to bring up the "Security Settings" screen.

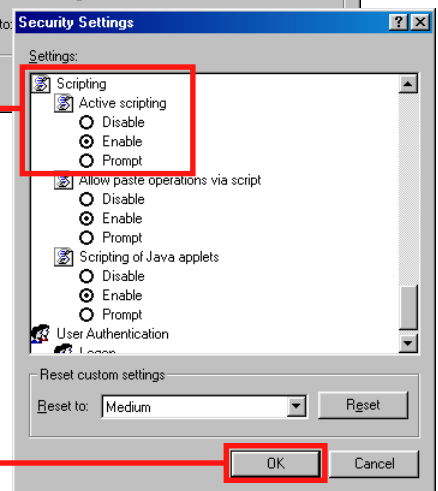
Scroll down to the "Cookies" heading and select "Enable" for both statements under "Cookies."

Cookies and security

See page 5 for important information on accepting cookies.



Scroll down to the "Scripting" heading and select "Enable" under "Active scripting."



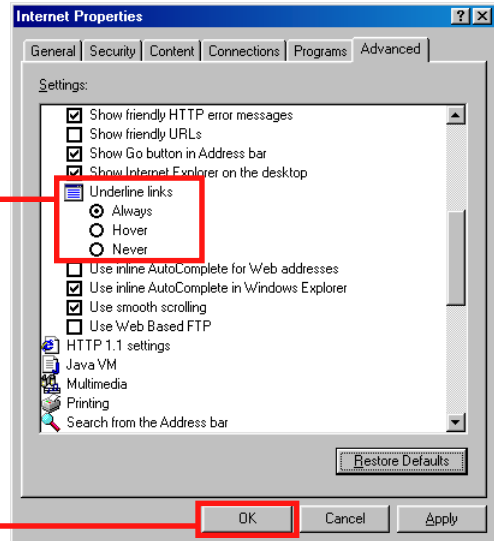
Click "OK" to return to the "Internet Properties" screen.

Then click the “Advanced” tab to bring the “Advanced” screen to the front.

Scroll down to “Underline links” and make sure “Always” is selected. If not, click once to select.

Note that, as in this example, there may be other properties already checked. This is normal, so don’t change any other settings than the ones specified here.

Click “OK” to save your changes.



Congratulations! Internet Explorer is now configured to support Service Mate with a stand-alone modem connection. You can now proceed to Step 2 on page 17.

Netscape Communicator 4.7

Note

Service Mate is designed to work best with Internet Explorer. For information on how to download Internet Explorer for free, see page 5.

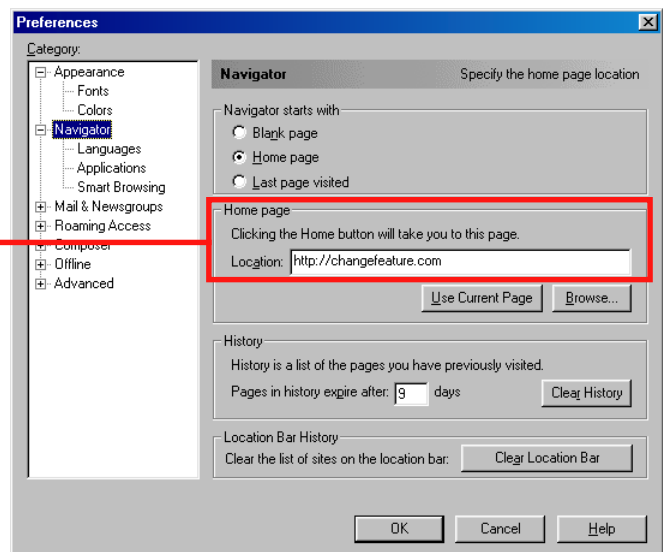
Launch Netscape Navigator.

Select "Preferences" from the Edit menu.



Select "Navigator" in the "Preferences" sidebar.

If you access Service Mate often, or if you use your browser solely to access Service Mate, you may wish to change your home page to the Service Mate address. With your home page on Service Mate, your browser will automatically open to Service Mate when you open your browser. To change the home page, type **http://changefeature.com** in the "Location" field.

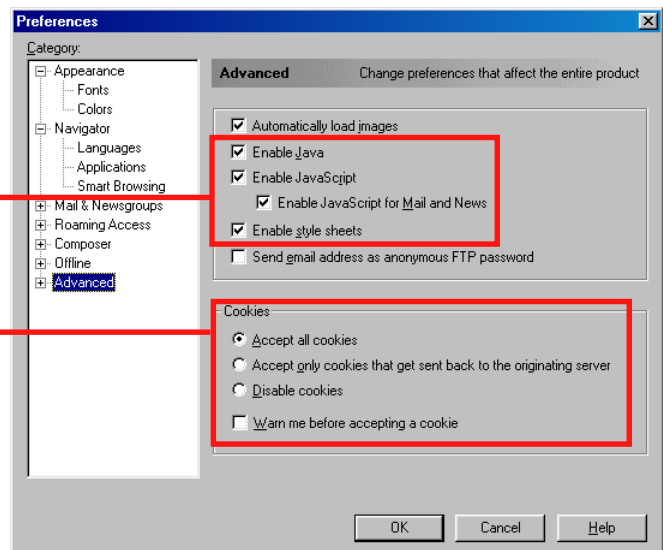


Select "Advanced" in the "Preferences" sidebar.

Make sure these checkboxes are checked:

- "Enable Java"
- "Enable JavaScript"
- "Enable style sheets"

Select "Accept all cookies."



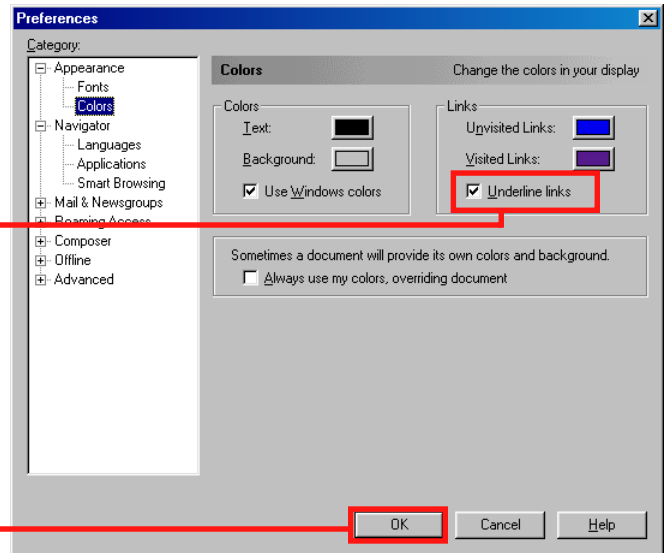
Cookies and security

See page 5 for important information on accepting cookies.

Select "Appearances" and then "Colors" in the Preferences sidebar.

Make sure the "Underline links" checkbox is checked.

Click "OK" to save your preferences.



Congratulations! Netscape Communicator is now configured to support Service Mate with a stand-alone modem connection. Now you can move to Step 2 on page 17.

Step 2: Configuring the dial-up connection

Windows 95 or 98

If you are using Windows NT, please see page 20.

In this step, you set up your computer to dial in to the Service Mate servers. This allows your computer to connect, via modem, to Service Mate. Follow the instructions on the next few pages to set up the connection.

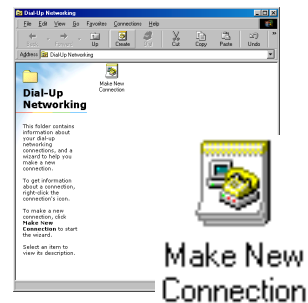
From the Start menu: in Windows 98, select Programs>Accessories> Communications>Dial-Up Networking. In Windows 95, select Programs>Accessories>Dial-Up Networking.

The “Dial-Up Networking” window will appear.

From the “Dial-Up Networking” window, click the “Create” button or double-click the “Make New Connection” icon. (Depending on your version of Windows, you may have only one or the other.)

Note on screen shots

The images in this section and in Step 3 are from Windows 98. If you are using Windows 95, your screens may differ slightly, but the steps remain the same.

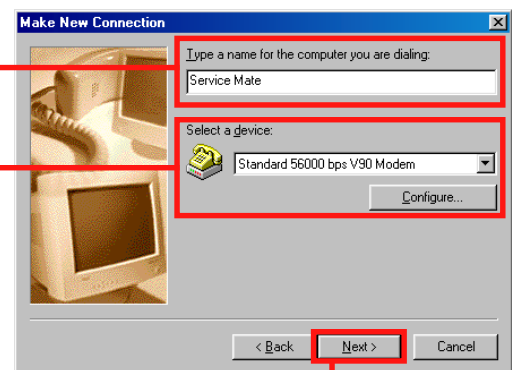


The “Make New Connection” screen will open.

At the top, type in a name for the connection, for example, “Service Mate.”

The “Select a device” panel allows you to select the modem that you want to use for this connection. In most cases, your computer will have only one modem, or the computer will have selected the default modem for this connection. If you wish to change the computer’s selection, click the appropriate selection on the dropdown menu.

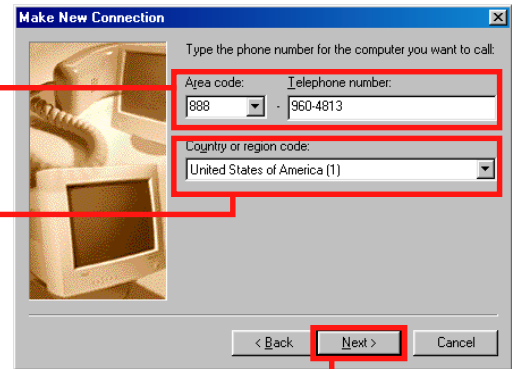
Click the “Next” button.



Now fill in the area code and telephone number panels.

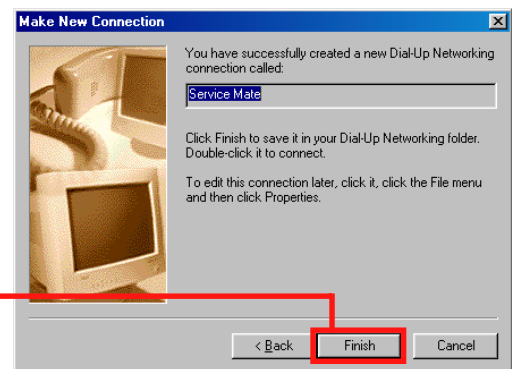
Enter the access number: 888 960-4813. This telephone number provides access to the Service Mate servers.

The country code should already be set for "United States of America (1)." If not select it from the dropdown menu.



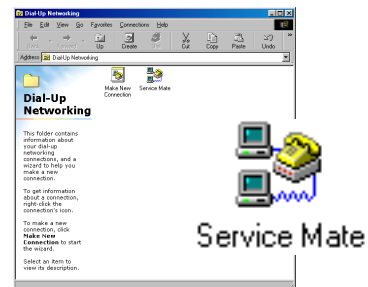
Click "Next."

Your screen will now indicate that you've successfully created a new connection.



Click "Finish."

Your computer will have placed a new icon in the "Dial-Up Networking" window.



Right-click on the icon and select "Properties."

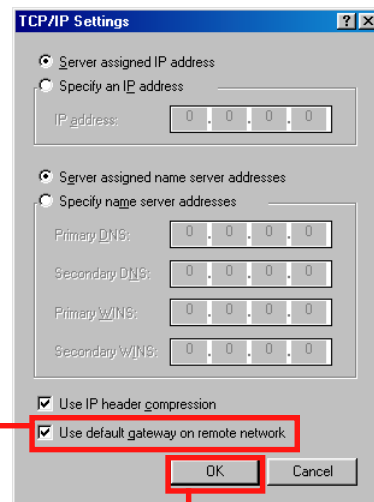
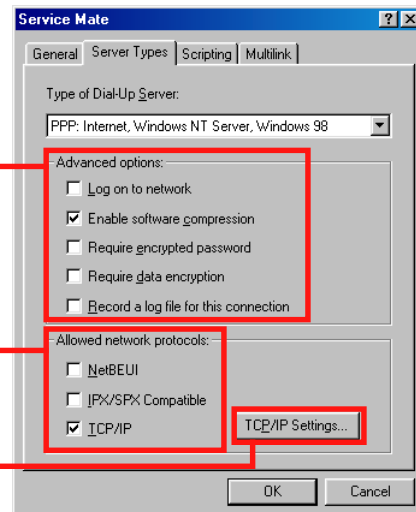


In the Service Mate properties window, click on the “Server Types” tab to bring the “Server Types screen to the front.”

Under “Advanced options,” only “Enable software compression” should be checked. Uncheck any other options.

Under “Allowed network protocols,” only “TCP/IP” should be checked. Uncheck any other protocols.

Click “TCP/IP Settings” to open the “TCP/IP Settings” screen.



Make sure that “Use default gateway on remote network” is checked.

Click “OK” to save your changes to this screen.

Click “OK” in the Service Mate properties window to save those changes and return to the “Dial-Up Networking” window.

You are ready to move to Step 3 on page 23.

Creating a shortcut on your desktop

If you use Service Mate all the time, you may wish to put the dial-up icon on your desktop. From the “Dial-Up Networking” window, place your mouse over the “Service Mate” icon and right-click. You will see a dropdown menu. One of the options is “Create Shortcut.” Click on this option. Your computer will ask if you’d like a shortcut placed on your desktop. Click “Yes.”



Windows NT (version 4.0, service pack 3 or higher)

If you are using Windows 95 or 98, please see page 17.

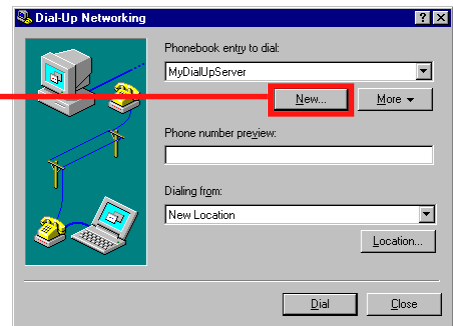
In this step, you set up your computer to dial in to the Service Mate Terminal Server. This allows your computer to connect, via modem, to Service Mate. Follow the instructions on the next few pages to set up the connection.

From the Start menu, select Programs>Accessories>Dial-Up Networking.



The “Dial-Up Networking” screen will appear.

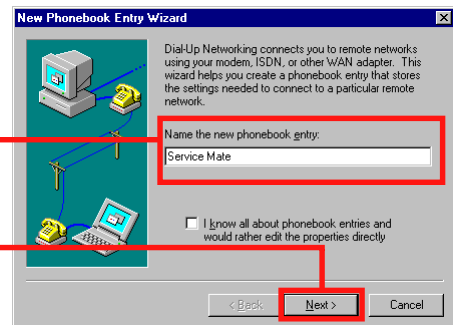
Click “New” to create a phonebook entry for Service Mate.



The New Phonebook Entry Wizard appears.

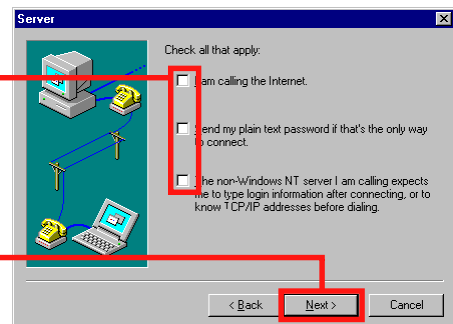
Name the new entry “Service Mate.”

Click the “Next” button.



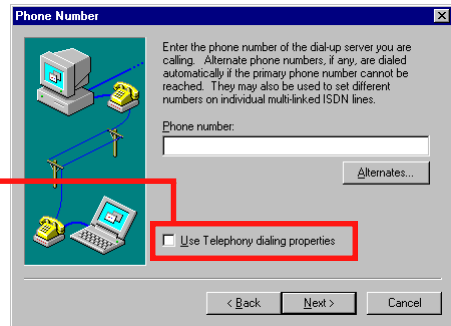
On the next screen that appears, make sure all the checkboxes are unchecked.

Click the “Next” button.



The next screen will prompt you to enter the Service Mate phone number.

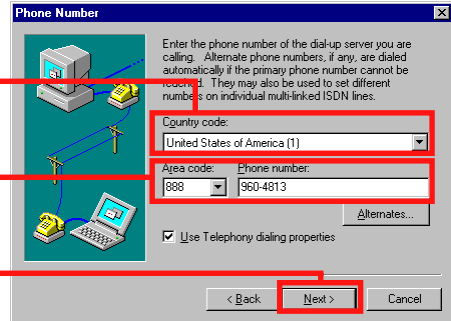
If the screen looks like the one to the right, check the "Use Telephony dialing properties" checkbox. The screen will change to the example immediately below.



The country code should already be set for "United States of America (1)." If not, select it from the dropdown menu.

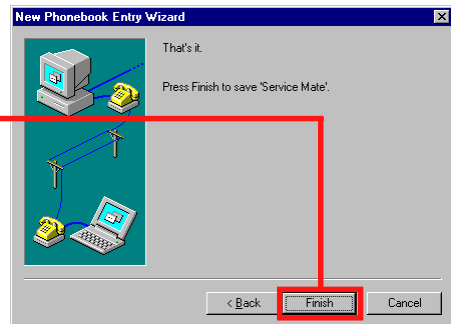
Enter the access number: 888 960-4813. This telephone number provides access to the Service Mate servers.

Click the "Next" button.



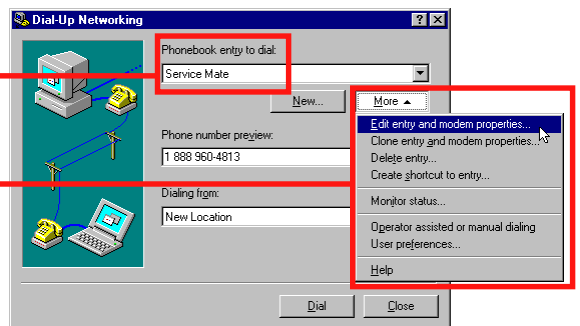
Your screen will now indicate that you've successfully created a new connection.

Click "Finish."



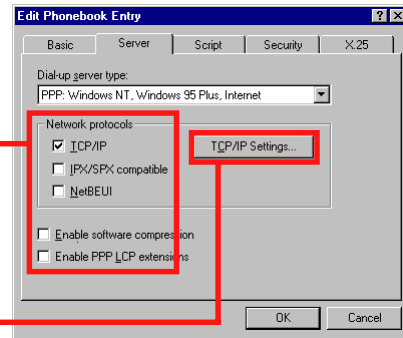
Your computer will return to the "Dial-Up Networking" screen. You will find "Service Mate" added to your phonebook entry menu.

Click the "More" button to open the dropdown menu. Choose "Edit entry and modem properties" from the menu.



The “Edit Phonebook Entry” screen will appear. Select the “Server” tab.

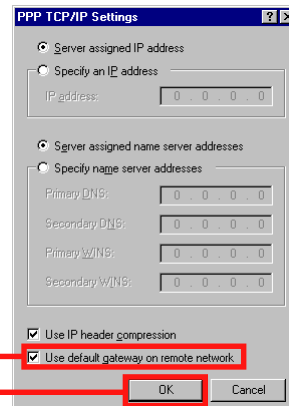
Make sure the “TCP/IP” checkbox is checked. The other checkboxes should be unchecked.



Click “TCP/IP Settings” to access TCP/IP options.

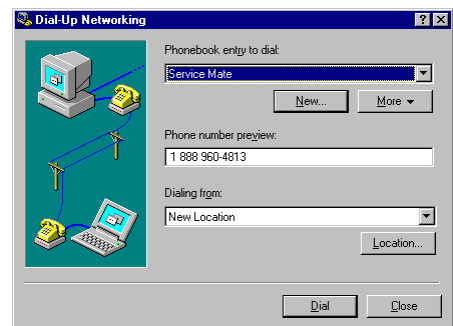
Make sure “Use default gateway on remote network” is checked.

Click “OK” to save your changes.



Once back on the “Edit Phonebook Entry” screen, click “OK” save your changes on that screen.

This returns you to the “Dial-up Networking” screen. You are ready to move to Step 3 on page 25.



Step 3: Connecting to the servers

Windows 95 or 98

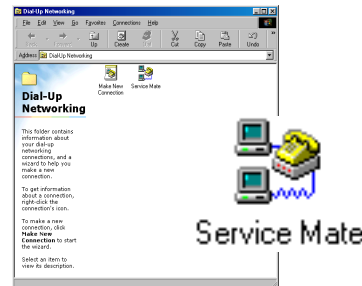
If you are using Windows NT, please see page 25.

This step shows you how to connect to the Service Mate servers that house the Service Mate application. Your computer will dial in to Service Mate and access the servers with a user name and password you'll set up in this step.

From the "Dial-Up Networking" screen (or your desktop, if you've created a shortcut), double-click on the Service Mate icon you created in Step 2.

Note on screen shots

The images in this section are from Windows 98. If you are using Windows 95, your screens may differ slightly, but the steps remain the same.



This opens the "Connect To" screen. Type this information in the appropriate field.

User name: **matesys** (all lowercase)

Password: **matesys** (all lowercase)

Check the "Save password" checkbox. You won't have to retype the user name and password each time you dial in.

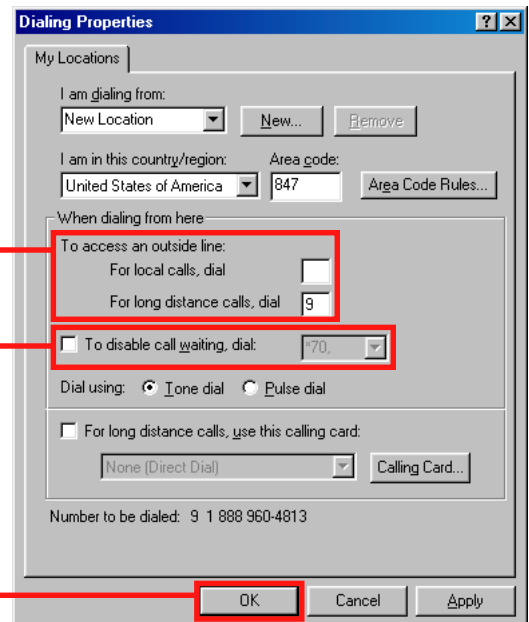
Click the "Dial Properties" button.



Review the information on this screen. It should reflect the specifics of your organization's telephone connections.

If you dial "9" to access a long-distance outside line, enter 9 in the "For long distance calls, dial" field.

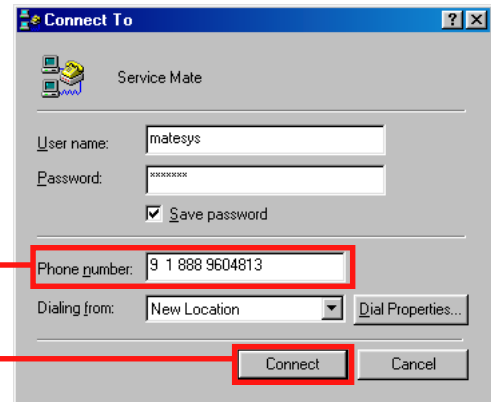
If your line has call waiting, check the box marked "To disable call waiting, dial:" and choose the code from the dropdown menu (usually *70).



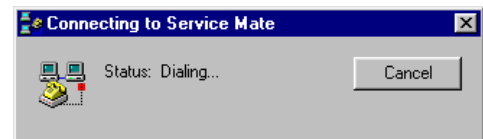
Click "OK." This will take you back to the "Connect To" screen.

Review the telephone number to make sure it is correct. The number should be 1-888-960-4813 with whatever prefixes you defined in “Dialing Properties” (in this example, a “9”).

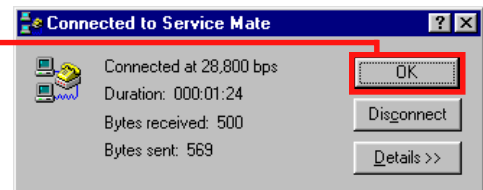
Click “Connect.” Your computer will begin connecting.



Your computer will access the modem and dial out to connect to the Service Mate servers. A screen like this will show you the status of your connection.



Once the connection is established, you may see a connection screen like this one. **Click “OK” and proceed to Step 4 on page 27.**



If you don't see the connection screen, look at the taskbar at the bottom right corner of your screen. If you see this icon, you're connected. You can open the connection screen by double-clicking the icon.



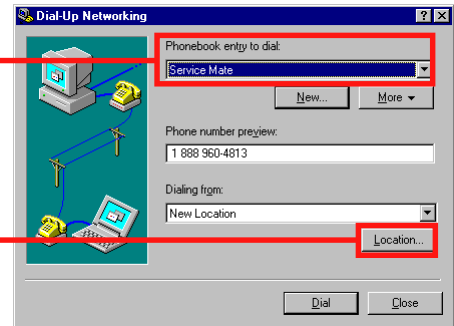
Windows NT

If you are using Windows 95 or 98, please see page 23.

This step shows you how to connect to the Service Mate servers that house the Service Mate application. Your computer will dial in to Service Mate and access the servers with a user name and password you'll set up in this step.

On the "Dial-Up Networking" screen, make sure Service Mate is the selected phonebook entry. If not, select it from the dropdown menu.

Click "Location" to confirm your dialing properties.

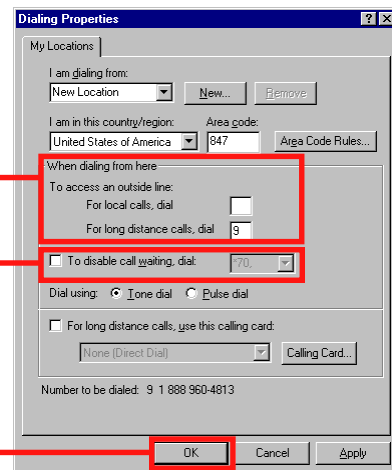


Review the information on the "Dialing Properties" screen. It should reflect the specifics of your organization's telephone connections.

If you dial "9" to access a long-distance outside line, enter 9 in the "For long distance calls, dial" field.

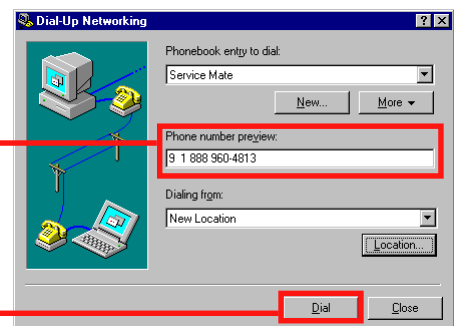
If your line has call waiting, check the checkbox marked "To disable call waiting, dial:" and choose the code from the dropdown menu (usually *70).

Click "OK." This will take you back to the "Dial-Up Networking" screen.



Review the telephone number to make sure it is correct. The number should be 1-888-960-4813 with whatever prefixes you defined in "Dialing Properties" (in this example, a "9").

Click "Dial."



This opens the “Connect To” screen. Type this information in the appropriate field.

User name: **matesys** (all lowercase)

Password: **matesys** (all lowercase)

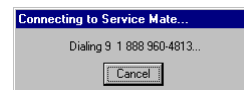
Leave the “Domain” field blank.

Check the “Save password” checkbox. You won’t have to retype the user name and password each time you dial in.

Click “OK.”



Your computer will access the modem and dial out to connect to the Service Mate servers. A screen like this will show you the status of your connection.



Once the connection is established, you may see a connection screen. **Click “OK” and proceed to Step 4 on page 27.**

If you don’t see the connection screen, look at the taskbar at the bottom right corner of your screen. If you see this icon, you’re connected. You can open the connection screen by double-clicking the icon.



Step 4: Logging in

Once you've completed Steps 1 through 3, you are ready to connect to Service Mate. With the dial-up connection you established in Step 3 still connected, launch your browser. If <http://changefeature.com> is not your default address setting, click the "Stop" button, type **http://changefeature.com** in the "Address" bar and press "Enter" on your keyboard.

Since Service Mate is a secure site, you may see a security warning. Click "OK" to continue.

Soon, you will see a screen similar to the one on the right.

At this point, enter your login ID and password. (The login ID is identical to the user name used on the older system. A temporary password will be assigned at training.)

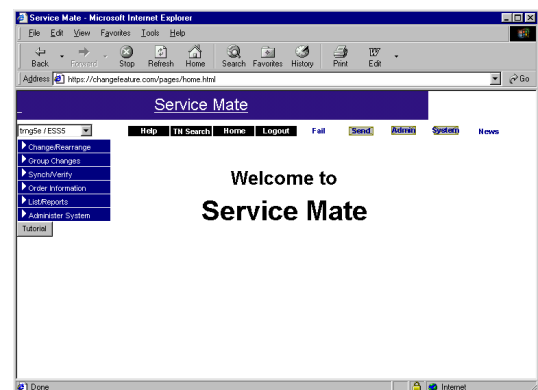
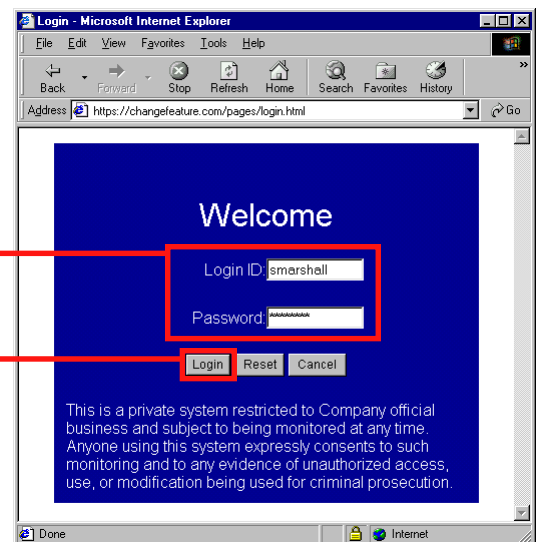
Click "Login."

Note: the first time you log in, you will be asked to change the temporary password. The system will walk you through the password change, and you will use the new password for 60 days. (Remember, you will be prompted for a new password every 60 days.)

It will take a few seconds for the Service Mate home page to load. While you wait, you will see the screen to the right.

When the home page appears, you've successfully logged in. Congratulations, you may now begin to use Service Mate.

Turn to page 32 for more information on how you can put Service Mate to work for you.



Having trouble?

If you're having trouble logging on to Service Mate, contact your own IT professional, or call the Help Desk at 1-800-635-7371.

Setting Up Service Mate: ISDN Connection

If you are using an ISDN line, follow the instructions in this section. If you have questions on Steps 2 and 3, call the Help Desk at 1-800-635-7371 and they will walk you through these steps.

Unsure of your connection type?

See page 4 for some helpful hints in determining your connection.

Step 1: Setting up the browser

With the new Service Mate, you need a browser. The steps for setting up your browser if you are using an ISDN line are identical to those for a stand-alone modem connection. Go to page 8, identify your browser type, and follow the instructions for setting up the browser.

Step 2: Configuring the dial-up connection

First, you will need to install the ISDN line with B channel data.

Next you will need to install a modem and associated software. This will create another member in the modem selection list on your PC.

Next you will need to configure a dial-up connection. These steps if you are using an ISDN line are identical to those for a stand-alone modem, with two exceptions:

1. For Windows 95 or 98 users: when you “Select a device,” select the ISDN modem instead of the V.90 or Analog modem.
2. For all users: when you enter the access number, type in the ISDN number: 800-649-9572, not the analog number: 888-960-4813.

Go to page 17 if you are using Windows 95 or 98 and page 20 if you are using Windows NT and follow the instructions for configuring the dial-up connection.

Step 3: Connecting to the servers

The steps for connecting to the servers if you are using an ISDN line are identical to those for a stand-alone modem. The only difference will be that you will make a connection to the server much more quickly than you would over an analog dial-up.

Step 4: Logging in

The steps for logging in if you are using an ISDN connection are identical to those for a stand-alone modem connection. Go to page 27 and follow the instructions for logging in.

Accessing Service Mate if You're Connected to a LAN

If you have a LAN connection, follow the instructions in this section. It is strongly recommended that you consult your network support personnel prior to configuring this connection.

Step 1: Setting up the browser

With the new Service Mate, you need a browser. The steps for setting up your browser if you have a LAN connection are identical to those for a stand-alone modem connection. Go to page 8, identify your browser type, and follow the instructions for setting up the browser.

There is one exception to the instructions above.

We recommend you do not change your home page to the Service Mate address if you are setting up the browser and you have a LAN connection.

Step 2: Configuring the dial-up connection

The steps for configuring the dial-up connection if you have a LAN connection are similar to those for a stand-alone modem connection. If you are on a LAN and are using Windows 95, 98 or NT dial-up networking, you may lose your connection while dialing up Service Mate. This is because dial-up networking normally gets higher routing priority than your LAN connection. Windows and Windows NT can only have one default route so, although your LAN connection is still operational, the operating system may not use it.

Please try the steps below to maintain your LAN connection while dialing up to Service Mate; they should work for most PC and LAN arrangements:

- Close any browsers that are open.
- Open any programs, such as your e-mail or a telnet session that you will want to use while connecting to Service Mate.
- Configure dial-up networking. Follow the instructions on page 17 if you use Windows 95 or 98 or on page 20 if you use Windows NT.

Step 3: Connecting to the servers

The first few steps for connecting to the servers if you have a LAN connection are identical to those for a stand-

Unsure of your connection type?

See page 4 for some helpful hints in determining your connection.

What's going on?

Step 3 and 5 will provide you with limited access to the LAN but you should still be able to do network printing. For instructions on how to have complete access to the LAN, contact the Service Mate Help Desk for more detailed documentation. Please follow these steps before contacting the help desk.

alone modem connection, with a couple of extra steps at the end of the process. Go to page 23 if you are using Windows 95 or 98 and page 25 if you are using Windows NT and follow the instructions for connecting to the servers. Then return to this page and follow the steps below.

From the Start menu in the lower left corner of your screen, select Settings>Control Panel. Find "Internet Options" and double-click the icon.

Click on the "Connections" tab. This will bring the "Connections" screen to the front. If you are using IE 4.0, click on "Connect to the Internet using a modem option. If you are using IE 5.0 or 5.5, click on "Always dial my default connection."

Click "OK" and the "Internet Options" box will close.

If your browser is open, close it and then open it again. It will immediately dial to the default connection.

Step 4: Logging in

The steps for logging in if you have a LAN connection are identical to those for a stand-alone modem connection. Go to page 27 and follow the instructions for logging in. Then return to this page and follow the remaining step below.

Step 5: Final step for Internet Explorer users (not necessary for Netscape 4.7 users)

From the Start menu in the lower left corner of your screen, select Settings>Control Panel. Find "Internet Options" and double-click the icon.

Click on the "Connections" tab. This will bring the "Connections" screen to the front.

If your browser is IE 5.0 or 5.5, click on "Dial whenever a network connection is not present."

If your browser is IE 4.0, click on "Connect to the Internet using a local area network."

Then close your dial connection and your open browser. Reopen the browser and you will should retain your LAN connectivity.

Test the LAN connectivity by trying to access applications that you commonly use (e-mail, file and print servers etc.)

If you are able to connect to Service Mate, but have not maintained your LAN connection contact the Help Desk at 1-800-645-7371. The Help Desk has more detailed instructions that can be used.

Getting Around Service Mate

Now that you've set up Service Mate, here are some helpful hints to get you started.

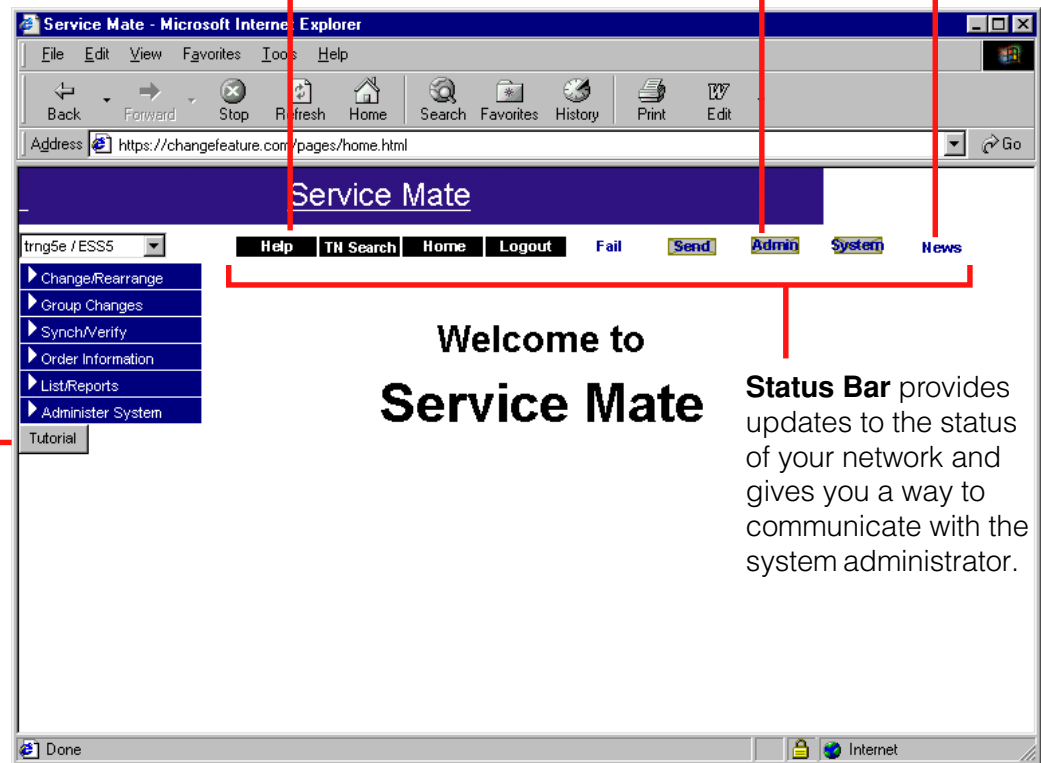
Special features of Service Mate

Help takes you to the screen appropriate to your question. Once in Help, you can search for keywords for more information.

Admin sends you information from the system administrator, for example, changes in Service Mate.

News sends you items of interest, such as system changes, training opportunities and customer meetings.

Tutorial walks you through key functions and features of Service Mate. Visit Tutorial when you first get started.



Status Bar provides updates to the status of your network and gives you a way to communicate with the system administrator.

Getting started

Service Mate has a tutorial to help you get started. See page 38 for information on how to use the Service Mate Tutorial.

A Help function is also included for your questions. See page 38 for more information.

Making the Most of Service Mate

How can Service Mate help me?

Now that you know about new Service Mate, let's take a look at how you can leverage what you've learned. Here are three examples of how you can use information from Service Mate for your own reports.

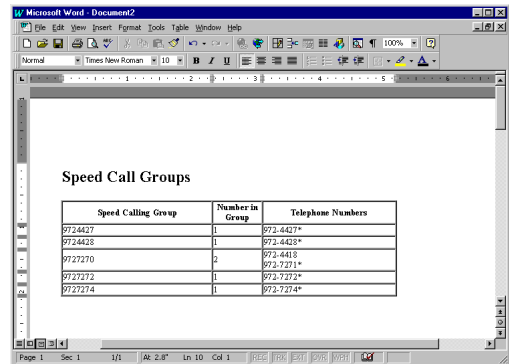
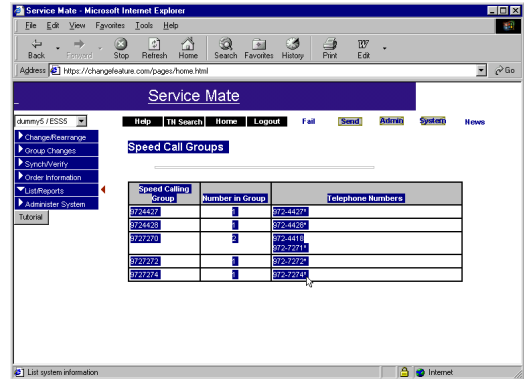
Copying and pasting

You can copy and paste selected information into another file. Let's look at how you can copy the Speed Call Groups list for distribution throughout your organization.

With the List Speed Call Groups page open on your browser, highlight with your mouse the information you want to copy.

Choose Edit>Copy. This copies the information.

Then open the program you want the information copied into (MS Word, in this example). Choose Edit>Paste. Your information will be pasted directly into the document, as illustrated in this example. (Note: Depending on your browser and the program you're copying the information into, you may need to format the information.)



Screen captures

Sometimes you may want to "take a picture" of the screen you're working on. Use a screen capture for this.

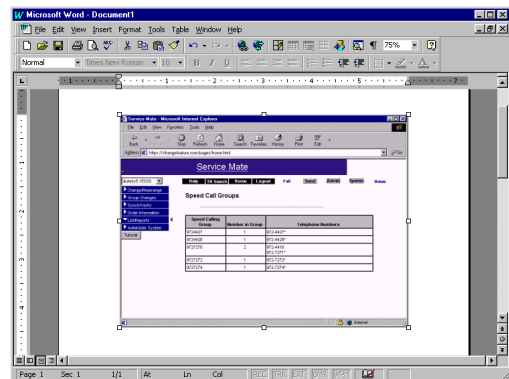
To take a screen capture:

With the screen you want to capture open, hold down the "Alt" key and press the "Print Screen" key on your keyboard. (It may be abbreviated to "prt scr" or something similar.) You have now copied the screen.

Open the program you want to put the screen capture in. Click on Edit>Paste in the upper left corner. Your information will be pasted directly into the document, as illustrated in this example. The screen capture is imported as a picture into your document. (Microsoft Word, in this example.)

Adjusting a screen capture:

You can adjust what's included in your screen capture. Click once on the screen capture to select it. You should



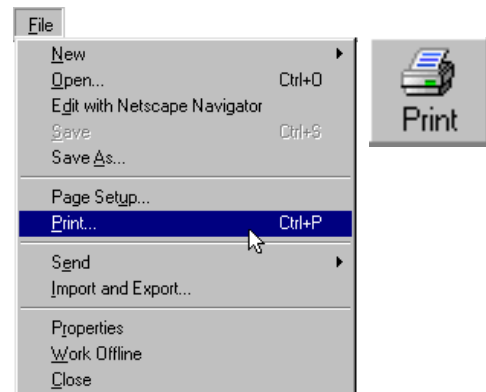
see an outline and small squares in each corner. You can drag the screen capture around your document.

(Note: Screen captures only save the visible information on the screen. If a window contains lengthy text that you scroll through, a screen capture won't copy all the information.)

Printing

You may also want to print directly from your browser. Choose "Print" from the File menu ("Print Frame," if you're using Netscape Communicator).

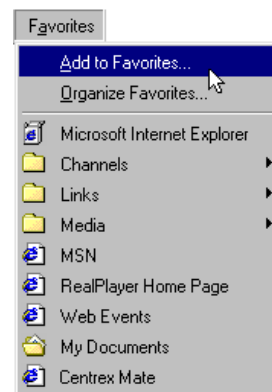
If the page prints incorrectly (for example, printing only the banner or navigation bar), your browser may have selected the wrong HTML frame to print. To correct this problem, click once within the text then print again.



How can I find Service Mate without having to type in the address each time?

The directions for setting up your browser (page 8) includes instructions for making Service Mate the default home page each time you open the browser.

You can also use the Bookmark/Favorites function of your browser to save time accessing the login screen. With the login screen in Internet Explorer, choose Favorites>Add to Favorites. The Service Mate login screen will be added to your list of favorites. In Netscape Communicator, the equivalent menu option is Communicator>Bookmarks>Add Bookmark.

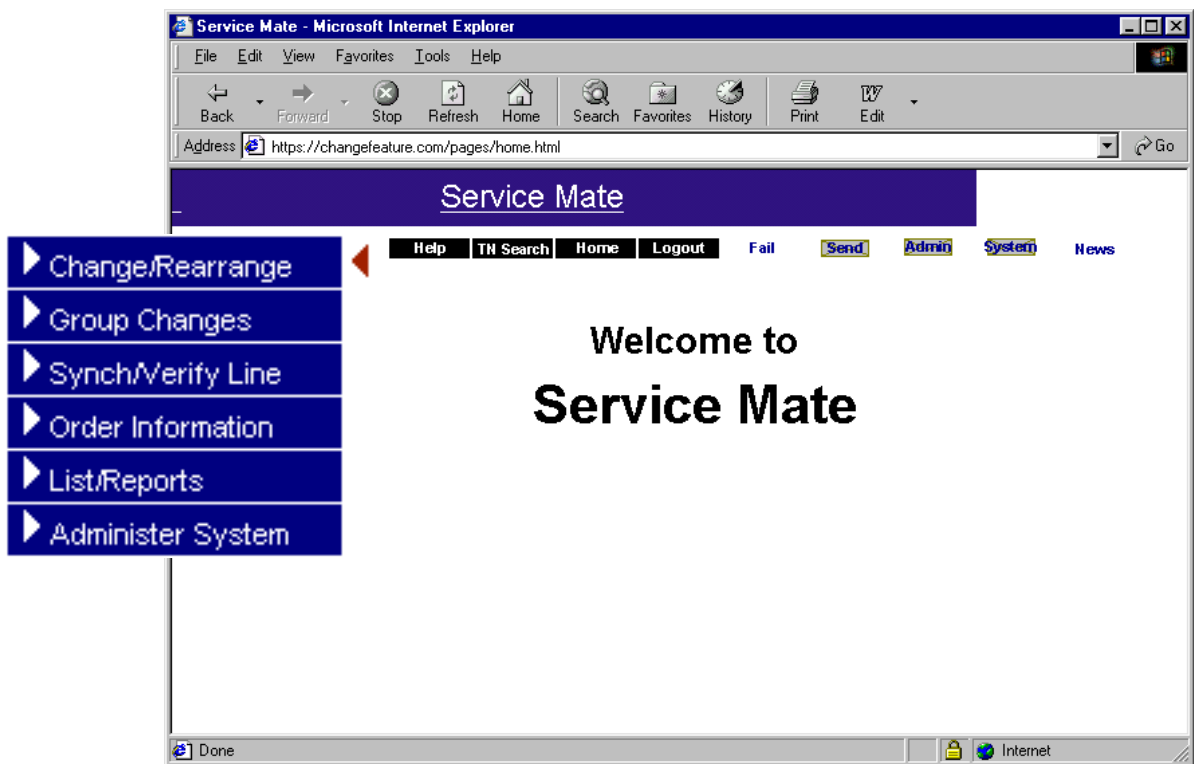


Do not set bookmarks for pages within Service Mate. The pages are created dynamically and may change.

How Is the New Service Mate Different from the Previous Version?

If you've been using an older version of Service Mate, you'll be pleasantly surprised by its new look and functionality. The Service Mate GUI is designed to be easy to use and works very much like a Web site.

It's fast and easy to use the new Service Mate. Rather than wading through manuals to find the right codes, you can make changes and see features with just a click of your mouse. What's more, Service Mate has the tutorial and help functions built right in, so you can teach yourself how to adapt Service Mate to your individual needs. The result: more time for you, cost savings for your company and better telephone service for everyone.



Users of the previous terminal interface of Service Mate will find the navigation menu intuitive. But to ease the transition, here is a list of Service Mate menus with corresponding commands from the old version.

▼ Change/Rearrange	
□ Line Features	- clf
□ SWAP/Rearrange	- crs
□ Authorization Codes	- cac

▼ Group Changes	
□ Call Pick Up Groups	- *
□ DN Hunt Groups	- cdh
□ GIC Groups	- *
□ MADN	- *
□ Speed Call Groups	- *

* These Group Changes functions are not available in Service Mate release 1 (except for DN Hunt Groups). Make all changes via the Line Features function in the Change/Rearrange application.

▼ Synch/Verify Line	
	- asv

▼ Order Information	
□ Advanced Orders	- vao
□ Batch Orders	- vbc
□ Daily Order Count	- vdc
□ Failed Orders	- vfo
□ Order History	- voh
□ Order History Size	- aoh
□ Pending Orders	- vpo

▼ List/Reports	
	- all lists, including: lca, lsf, lsi, ltd, etc.

▼ Administer System	
□ Call Pickup Text	- cct
□ Customer Contact Info	- acc
□ Customer Defaults	- ccd
□ Directory Information	- cdi
□ Directory Layout	- cd1
□ Password Change	- apc
□ Profile Customer Param	- acp
□ User Group	- cug
□ Feature Count History	- bfc
□ User Options	- new function
□ Mail Options	- arc, arm, ara asm

▼ Subuser Options	
□ Change Subuser Opts	- new function
□ List Subuser Opts	- new function

Frequently Asked Questions (FAQ)

Migration

How long will the existing Service Mate be supported?

The existing Service Mate application will be supported through the 3rd quarter of 2001. After that, the only access to Service Mate will be through the new GUI.

Will I still have the same capabilities in the new Service Mate?

You will have all of your existing capabilities as well as some additional switch features.

Will I be able to use the old Service Mate and the new Service Mate at the same time?

Once your user ID is converted to the new Service Mate, you will not be able to access the old Service Mate with that user ID. Other user IDs that have not been converted will be able to access the old Service Mate while you access the new Service Mate.

Will I still be able to use my VT100 terminal?

No. You can only access the new Service Mate using a Web browser, such as Internet Explorer.

What is the cost of the upgrade?

There is no charge for the upgrade to the new Service Mate or the associated user training.

Setup and access

What if my PC does not meet the specifications for the new Service Mate?

If you can access the Internet and use a Web browser with your PC, you should be able to use the new Service Mate. However, you may receive limited support from the Service Mate Help Desk if your PC does not meet the minimum recommended specifications.

Can I access the new Service Mate over the Internet?

Yes, there is a shorter set of instructions for accessing via the open Internet.

Training

How do I get scheduled for training?

Contact your account representative.

What information will I need when registering for training?

You will be asked for your name, company name, phone number, fax number, e-mail address (if you have one), desired location of training, the switch type you work on and your Service Mate user ID. Each person registering will be required to have his or her own user ID.

Do I have to attend training?

Training on the new Service Mate is highly recommended. If you choose not to attend, you will need to complete and send a Training Declination Form requesting that your user ID be activated for the new GUI.

User IDs and passwords

Will I still be able to share a user ID with other people?

Sharing user IDs is not allowed for security reasons. It is recommended that you contact the Help Desk at 1-800-635-7371 to get individual user IDs.

Will I get a new user ID or password for the new Service Mate?

After training, your existing user ID will be converted to allow access to the new Service Mate. You will receive a new, temporary password. Use this temporary password the first time you login. At your first login, you will be prompted for a new password, which will remain in effect for the standard 60 days.

What if I forget my user ID or password?

Simply contact the Help Desk at 1-800-635-7371.

What If I Need More Information?

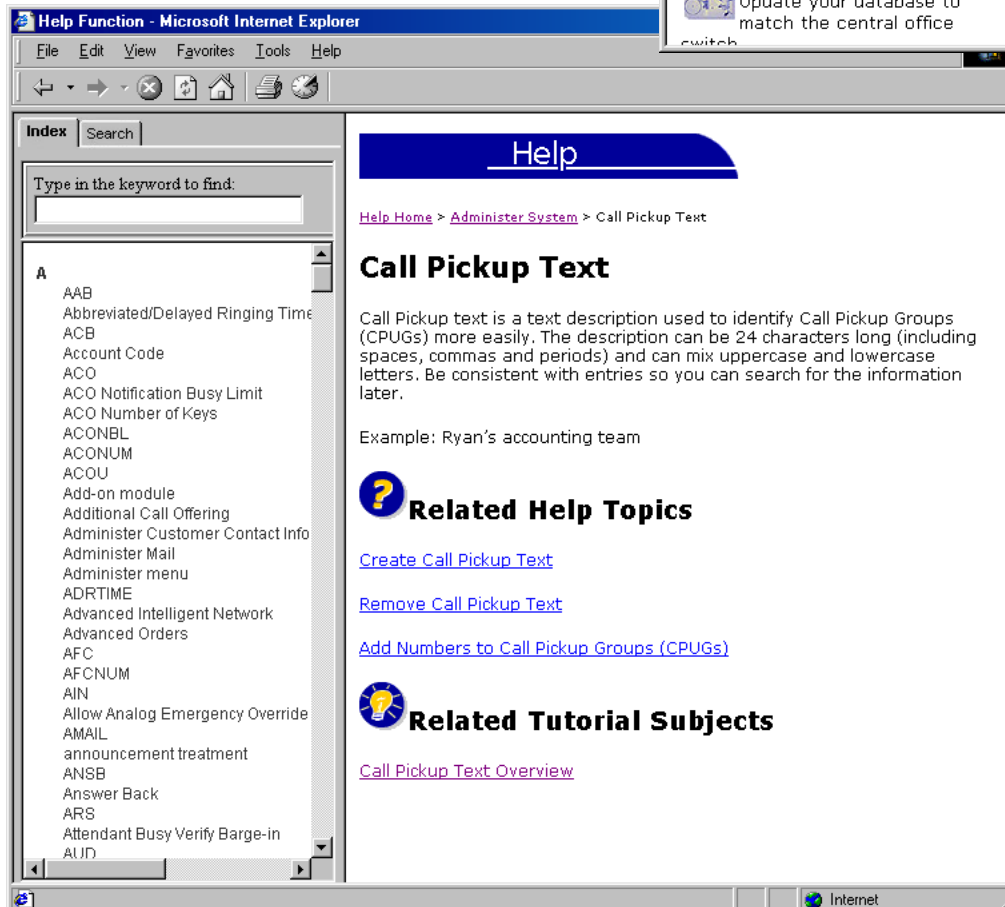
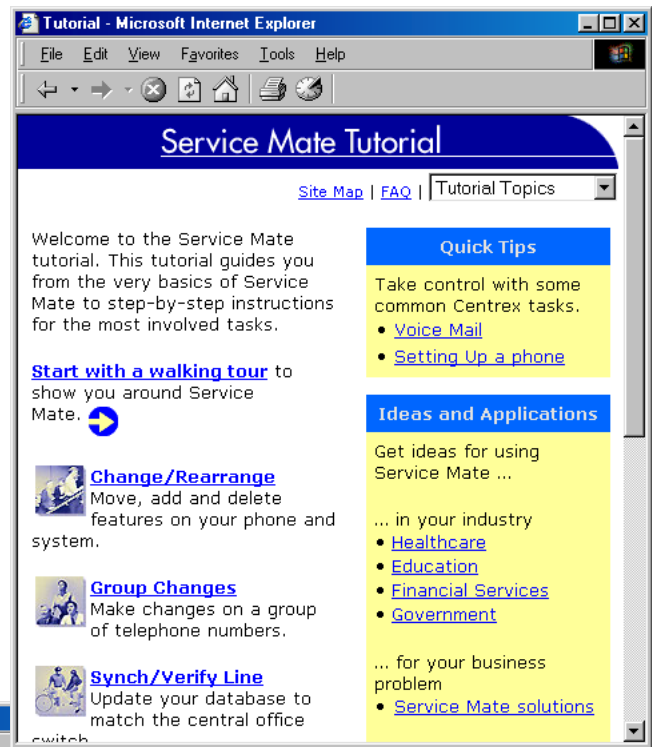
Service Mate Help and Tutorial

Service Mate has a tutorial to walk you through Service Mate's features and functionality, and a help function to answer your questions while you're within Service Mate. The tutorial and help functions work in tandem with Service Mate, so you have all the information you need in one place.

The Service Mate Tutorial and Help function show you how to customize Service Mate to *your* needs and focus on *your* business.

The Service Mate Tutorial explains key features of Service Mate and offers helpful hints, a walking tour, even ideas on how to apply Service Mate's functions to your business.

Take the walking tour to get more comfortable with using Service Mate.



Service Mate's handy help function is context-based and works like many other Windows-based help functions. Click on "Help" from within Service Mate, and the appropriate topic will appear.

Internet Explorer users will see a search screen on the left where they can search for a particular help topic.

Here is a map of the Service Mate Tutorial's contents.

Tutorial Home



Walking Tour

- Service Mate Benefits
- Get Started



Change/Rearrange

- Overview
- Line Features
- Add/Remove Features (Analog Lines)
- Add/Remove Features (ISDN and Business Sets)
- Add/Remove Call Appearances (ISDN)
- Add/Remove Directory Numbers (Business Sets)
- Copy Features
- Move Features
- Change Directory Information
- SWAP/Rearrange
- Authorization Codes
- Helpful Hints



Group Changes

- Overview
- Directory Number Hunt Groups



Synch/Verify Line



Order Information

- Overview
- Advanced Orders
- Batch Orders
- Daily Order Count
- Failed Orders
- Order History
- Order History Size
- Pending Orders
- Helpful Hints



List/Reports

- Overview
- Helpful Hints



Administer System

- Overview
- Call Pickup Text
- Customer Contact Information
- Customer Defaults
- Directory Information
- Directory Layout
- Password Change
- Profile Customer Parameters
- User Group
- Feature Count History
- User Options
- Mail Options
- Helpful Hints



Subuser Options

- Overview
- Change Subuser Options
- List Subuser Options
- Helpful Hints

Quick Tips

- Voice Mail
- Setting Up a Phone

Ideas and Applications

- In Your Industry
 - Healthcare
 - Education
 - Financial Services
 - Government
- For Your Business Problem
 - Service Mate Solutions
- For Businesses of Your Size
 - Small Business
 - Medium-Sized Business
 - Large Business

Frequently Asked Questions

Miscellaneous

- Customization Control Panel

Help Desk

For those times you can't find the answer to your question in Tutorial or Help, call the Help Desk.

Help Desk: 1-800-635-7371

7:30 a.m. to 4:30 p.m. CST, Monday through Friday

Note: If you need assistance outside of normal Help Desk hours, leave a voice mail message at the telephone number above. You will receive a response the morning of the next working day. For emergency assistance, please call the same number and follow the prompts to have someone paged.