



DIGITAL TRANSFORMS PHYSICAL

Codebeamer Integration into PTC’s eSupport Portal – Customer FAQ

- INTRODUCTION TO THE CODEBEAMER TECHNICAL SUPPORT INTEGRATION.....2**
- DOWNLOADING CODEBEAMER SOFTWARE.....2**
- CONTACT INFORMATION FOR TECHNICAL SUPPORT3**
- THE PTC ESUPPORT ACCOUNT3**
 - ALREADY HAVE A PTC ESUPPORT ACCOUNT?..... 3
 - DON'T HAVE AN PTC ESUPPORT ACCOUNT YET: 4
 - WHERE CAN I FIND THE SERVICE CONTRACT NUMBER (SCN), THE SALES ORDER NUMBER (SON) OR THE SITE NUMBER?..... 4
 - WHAT TO DO IF I HAVE PROBLEMS WITH CREATING A PTC ESUPPORT ACCOUNT?..... 4
- WHAT’S NEW?.....4**
 - SELF HELP FOR CUSTOMERS..... 4
 - REACHING OUT TO THE ASSISTED SUPPORT TEAM ONLINE WITH A REQUEST (“OPEN A CASE”) 4
 - MANAGING EXISTING REQUESTS (“CASES”) ONLINE 5
 - ATTACHING FILES TO A REQUEST (“CASE”) 5
 - OTHER FUNCTIONALITY AVAILABLE FOR A REQUEST (“CASE”) MANAGEMENT 5
 - REACHING OUT TO ASSISTED SUPPORT VIA PHONE 5
 - REACHING OUT TO ASSISTED SUPPORT VIA EMAIL..... 5
 - SUBSCRIBING TO VARIOUS SUPPORT RELATED INFORMATION AND SUPPORT ARTIFACTS 5
 - MANAGING ESUPPORT PORTAL PRIVILEGES FOR USERS (“ONLINE SUPERVISOR” ROLE)..... 5
- SOME NOTABLE CHANGES WHEN SWITCHING FROM CODEBEAMER.COM TO ESUPPORT PORTAL6**
 - ADDING SPECIFIC “TAGS” TO CASES AND FILTER CASE LISTS BY THESE “TAGS” 6
 - CUSTOMIZING THE AMOUNT OF INFORMATION IN CASE LISTS/REPORTS..... 6
 - ADDING PICTURES IN CASE COMMENTS..... 6
 - EDITING EXISTING COMMENTS 6
 - UPDATING/EDITING CASES DIRECTLY FROM A CASE REPORT..... 6
 - DIFFERENTIATING WHICH USER CAN DO WHAT ON THE ESUPPORT PORTAL 6
 - INVOLVING OTHER PARTIES INTO A SPECIFIC CASE 6
 - REFERENCING/LINKING CASES TO EACH OTHER ITEMS 7
- WHAT WILL HAPPEN TO THE CURRENT TICKETS ON CODEBEAMER.COM?7**
- PTC NOMENCLATURE AND TERMINOLOGY.....7**
- USEFUL LINKS8**

Introduction to the Codebeamer Technical Support Integration

In November 2023, PTC's business systems are being extended to incorporate Codebeamer products. This page has been created to help guide Codebeamer customers through the entitlements and features of the PTC support system.

Support for Codebeamer products will continue to be provided by a growing world-class team at the service levels for Codebeamer described in the [Codebeamer T&Cs](#).

PTC offers multiple options to actively get assistance for technical aspects of using PTC software, like for example:

- The Knowledge Base/Self-Help
 - Finding solutions and information in our Knowledge Base for immediate relieve
- Assisted Technical Support
 - Technical Support from the PTC Support Team of Product Experts

Depending on the type of issue (like: is it more of a “How-To” question or a “Break/Fix” issue), impact of the topic (how is the topic impacting the value generated by the use of the PTC application) and urgency of the subject (how quickly would feedback be required) users should choose what is best for their particular topic. Customers that reach out to PTC Technical Support leveraging the [eSupport portal](#) tool will be guided through these options in order to ensure the best course of action depending on their topic at hand.

To access PTC's Technical Support Resources, users do need a so-called PTC eSupport Account. This eSupport Account is the key to access Knowledge Resources, Reference Documentation, Assisted Support and information about Licensing, Software Downloads and many additional tools PTC provides.

You'll also be able to report any feedback or improvements on this guide by selecting the "General Feedback" tile within the ["My PTC Assistant"](#)

Downloading Codebeamer Software

The Codebeamer software is already available for Download at [PTCs regular Download Section](#) in the eSupport Portal. Customers with an **active PTC eSupport Account** can download the software from this location. The previous download location will be retired later this year (beginning of October 2023) and all bookmarks pointing to the previous location will then direct users to PTC Download section in the eSupport portal. If you already have an active PTC eSupport Account, you can already download Codebeamer from this location. If you need help creating an account, please see below.

Attention: once the former download areas for Codebeamer will have been retired, downloads will only be available at PTC's regular Download section. Hence if you still need to create your PTC eSupport Account, please don't hesitate to do so sooner than later (and **ideally before beginning of October**).

Contact Information for Technical Support

Codebeamer customers will receive support through:

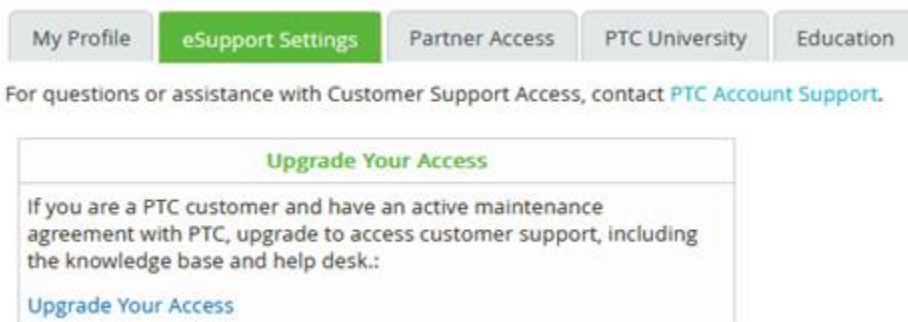
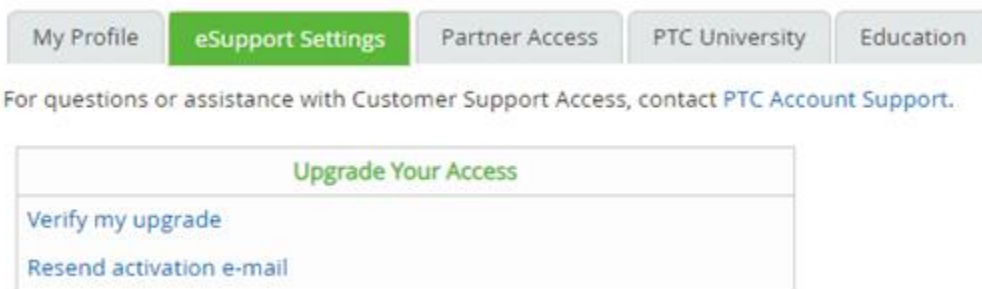
- Web
 - [eSupport Portal](#)
- Phone:
 - [Americas](#)
 - [Europe & Africa](#)
 - [Asia & Pacific Rim](#)

The PTC eSupport Account

Already have a PTC eSupport Account?

That's great! To check whether any further steps are required to access Technical Support, go to [PTC eSupport portal](#), Log-In and visit the "[eSupport Settings](#)" tab under # [Username] # **Manage My Web Account**.

If you see an "Upgrade your Access" message, follow the steps to either provide us with additional data to associate your user account with an active Customer Number, or to receive an email to verify your upgrade:



For upgrading the access, you will need one of the following pieces of information:

- Service Contract Number (SCN) or
- Sales Order Number (SON) or
- Site Number

If you need help locating any of these resources, please see below.

Don't have an PTC eSupport Account yet:

Visit [PTC eSupport portal](#) and click on the "Create a new account" link to start the account creation process. Under the "New Customer" tab, enter all required information, including a Customer Number and any one of the following:

- Service Contract Number (SCN) or
- Sales Order Number (SON) or
- Site Number

You must complete this section to create a Customer Account to gain access to all Support entitled areas of PTC.com.

Customer Number:

Please supply one of the following pieces of information for verification. 

Service Contract Number (SCN):

or

Sales Order Number (SON):

or

Site Number:

If you need to figure out, where to find that information, please see below.

Where can I find the Service Contract Number (SCN), the Sales Order Number (SON) or the Site Number?

This information is part of your "PTC Software Order Fulfillment" letter that is sent with any new- or updated Software Order. This Letter/Email is typically sent to the contact at your company involved in the purchasing process.

What to do if I have problems with creating a PTC eSupport Account?

In case you encounter issues when trying to create your PTC eSupport Account, please feel free to reach out to the Web Account team using the [Web Account Case Logger](#)

What's new?

In summary, we will switch from using codebeamer.com for the online interaction between customers and Codebeamer Technical Support to using PTC's eSupport portal and the corresponding state-of-the-art Support processes and tools. This switch results in a set of changes for users that have been working with Codebeamer Support in the past:

Self Help for Customers

The **PTC Technical Support Knowledge Base** provides easy access to a wide selection of technical content about PTC Products and Solutions: including technical articles, product documentation, community threads, training tutorials, digital services (how to interact with PTC's services online) and SPRs. The Knowledge Base can either be accessed directly from the [eSupport portal](#) (on the top of the page) or [here](#).

Reaching out to the Assisted Support team online with a request ("open a case")

For any assistance or support requests, we kindly ask you to create tickets (cases) on the [Support Assistant](#) portal using the Support Assistant, instead of the <https://codebeamer.com/> web page.

The Support Assistant should be easy to use and self-explanatory. Information about its use can be found in the following article [CS67798](#).

Managing existing requests (“cases”) online on the eSupport Portal

When you open [the eSupport portal](#) and login with your PTC eSupport Account, you will immediately see your active Requests under the “My Active Requests” section of the eSupport portal. More detailed searching and filtering options are available, if you click on the “[View Request History](#)” link that can be found there as well.

Attaching files to a request (“case”)

You can either attach files while creating a new request or attach files at any time after case creation. In the “Case Viewer” for a particular request (“Case”), select the **Upload Attachment** button to open the Upload Data window, then choose the Browse button to find and select the files to add to your case file.

Important! If the logs you wish to attach to the case exceed 2 gigabytes, please utilize the PTC secure SFTP server. Refer to our [Customer Service Guide](#) for [detailed instructions and other options for sending your case attachments](#) to PTC Technical Support.

Other functionality available for Request (“Case”) Management

In addition to uploading files, you have several other options by which you can manage your case. Some examples of such functionalities:

- **Add Comments:** Choose this button to add comments or additional information about your case that can potentially help the Support Engineer to resolve your issue.
- **Close Case:** If your issue has been resolved to your satisfaction, you can choose the Close Case button to close your case. A Support Engineer can also close the case upon your approval as well.
- **Change Severity:** Choose this button to change the severity level of your issue – if it has increased or decreased.
- **Escalate Case:** Choose the Escalate Case button to notify Technical Support Management if you feel your case is not being handled appropriately or efficiently enough.
- **Subscribe to this Case:** Choose this button to receive email notifications when updates to this case have been made by a Support Engineer or by you.

Reaching out to Assisted Support via Phone

Please note that the old telephone numbers previously associated with Inland / Codebeamer support will no longer be operational. To ensure a smooth communication process, we have introduced new PTC telephone numbers. You can find the updated contact details communicated above.

Reaching out to Assisted Support via email

We would like to inform you that moving forward and after the switch customers will be able to reach out to the Assisted Support team either via phone or by leveraging the eSupport portal. The email address "support@codebeamer.com" will be retired.

Subscribing to various Support related Information and Support artifacts

[The PTC eNews & Alerts tool](#) allows you to receive automated notifications tailored to meet your preferences (products and releases you are interested in, frequency of delivery). More information about this functionality can be found [here](#).

Managing eSupport Portal Privileges for users (“Online Supervisor” role)

The eSupport portal offers the ability to define what users with a PTC eSupport Account can do on the eSupport portal to give control of “who can do what on PTC’s eSupport portal” in a given company. For example, it can be defined that such a user is allowed to create “cases” with Technical Support or ask for Licenses or License Reports – and many other functionalities. To use this functionality, at least one specific user of a company needs to become the so called “Online Supervisor”. This role then has control over these privileges and manages them. If you want to learn more about the “Online Supervisor” please see

this article [CS173816](#). If there is currently no assigned Online Supervisors in the company, contact PTC Account Support through [Web Account Case Logger](#).

Some notable changes when switching from codebeamer.com to eSupport Portal

Adding specific “tags” to Cases and filter case lists by these “tags”

codebeamer.com offers the option to add “tags” to tickets so that users could sort and filter tickets by these tags. A similar functionality is available on the eSupport portal: “Case Viewer” and “Case Tracker” offer a functionality of the so called “Customer Tracking Number”. This is a unique identifier that you can define yourself for easy tracking of the case on eSupport Portal. With this, customers may specify an on-going project name as the tracking number on all the cases that customer open with PTC, that are related to the project. Customers can then easily track all these cases by specifying the project name in the online Case Tracker Tool.

Customizing the amount of information in case lists/reports

In codebeamer.com it is possible to customize the report of tickets and add specific “columns”. The default report of the “Case Tracker” provides a fixed set of information (Severity, Case Number, Subject, Product, Case Contact, Case Created Date), which – as of today – cannot be modified. However, the Case Tracker offers an option to export the list of cases into external files (CSV, TSV or Excel). This export contains more information (for example: Last Update Date, Release, Status, and many more more) – also including the “Customer Tracking Number” (see above), allowing for detailed filtering of case lists in external tools like MS Excel.

Adding pictures in Case Comments

When adding comments in codebeamer.com, it is possible to embed pictures into the comment (inline in the text). In the Case Viewer text and pictures need to be handled separately – either by adding pictures as an attachment and referring to it in the comment (or by creating and adding documents – like a MS Word file - that have embedded pictures). Customers can also reply to emails that are related to a specific case and embed images in that email thread (the system will handle that automatically). The functionality of having pictures embedded in comments is considered for a future improvement of the case viewer.

Editing Existing Comments

Once a comment has been entered in a case using the corresponding functionality in the Case Viewer, this comment is fixed. The ability to edit existing comments is part of a list of ideas that might be considered for a future improvement of the case viewer.

Updating/Editing Cases directly from a Case Report

Today comments can be entered only in the case viewer for a specific case. Like other editing functionalities (like updating severity, etc.): these are only available in the case view for a specific case.

Differentiating which user can do what on the eSupport Portal

The Account Management functionality of the eSupport Portal allows to control certain privileges for functionalities on the eSupport portal. Examples: open cases, software update access, access to license management tools, reporting capabilities, and others. The “Online Supervisor” of the customers can control these privileges. Please see above for more information on [Managing eSupport Portal Privileges for users](#).

Involving other parties into a specific case

With the help of the mentioning functionality of codebeamer.com (by preceding a specific user with an “@” character) users could involve other users into a specific ticket/tracker. In order to involve other persons from the same company apart from

the Case Contact, a user may Subscribe to the case. Subscribing to a case is possible from within the Case Viewer of a specific case.

Referencing/Linking Cases to each other items

The Case Viewer provides a section called “Related Resources”: Here you will find the articles and SPRs that are related to your case. No value will appear initially in this box immediately after opening a case. The related resources gets listed as and when the Technical Support representative identifies relevant documents to your query and associates your case to these documents for easy navigation.

What will happen to the current tickets on codebeamer.com?

With the integration of Technical Support for Codebeamer into PTC’s regular Support systems, Codebeamer customers will be able to reach out to the Assisted Support team leveraging PTC’s eSupport portal and the Support Assistant. During the months of November 2023 and December 2023, customers will also still be able to leverage codebeamer.com for reporting new issues. With the start of January 2024, reporting issues to the Assisted Support teams will only be possible using the eSupport portal and the Support Assistant and the option to create new incident and/or question tickets on codebeamer.com will be deactivated. However, the existing incident and question tickets that are still open will continue to be handled and completed on codebeamer.com. This means that there will be a short period where you will use both systems in parallel, using codebeamer.com for the old tickets and eSupport portal for the new tickets.

Improvement ideas / feature requests: Customers can continue to use Codebeamer for logging Ideas but they also now have the option to use the PTC forum: <https://community.ptc.com/t5/Codebeamer/ct-p/codebeamer>

Other type of tickets on codebeamer.com: No Change

Other functionality on codebeamer.com: No Change

PTC Nomenclature and Terminology

PTC has an online [Glossary](#) that can help with many of the new terms customers will need to know when working with PTC. Below are explanations of a few PTC terms as they relate specifically to Codebeamer customers.

Case

A Case is a single technical issue reported to PTC Technical Support. A Case may be reported to PTC Technical Support either online via the [PTC Case Logger](#) or by phone at one of the Technical Support toll-free numbers listed above. The old terminology, such as “ticket”, “incident”, and “question”, is no longer used.

Case status

This value represents the current status of the case. The status value might also include a sub status, example: 'Working/Information Requested' that represents additional action items, while the technical support engineer is working on the case.

Case severity

The severity of a case represents the importance or urgency of resolving the issue. A severity is assigned upon case initiation. This value can be updated at any point to reflect a change in the urgency of a resolution. Available case severities: [Link](#)

Release

Release is the major version of a PTC software product. Releases are versions where significant enhancements have been

made to the software product in order to provide value to maintenance paying customers. Some examples of Codebeamer releases are 21.09, 22.10, 2.0, 3.0, and so on.

Datecode

The Datecode is a release identifier. Some examples of Codebeamer datecodes are 2.0.0.1, 2.0.0.2, and so on.

Technical Area / Issue Type

There are currently 12 defined Issue Types that encompass the core functionalities of the Codebeamer application. These types include tracker administration, variant management, and more.

Skill / Issue Sub-Type

A subcategory of the Issue Type. For example, Tracker Configuration, Working-Set, and more.

Software Performance Report (SPR)

A Software Performance Report, or SPR, documents an issue that potentially may require software correction or a more detailed technical explanation. One SPR may be referenced by more than one Case number and/or customer.

Service Contract Number (SCN)

The Service Contract Number, or SCN, is a unique identifier to track your purchased maintenance for a PTC product or group of products. A valid SCN is required for all Technical Support services, including opening a Case, browsing the Knowledge Base, and downloading software updates.

Useful links

- [PTC Customer Support Engagement Guide](#)
- [My PTC Assistant](#) (report issues to PTC outside of Technical/Product Support)
- [Help Center / Product Documentation](#) (Codebeamer product will be available starting with January 2024)
- [Product Release Calendar](#)
- [Release Advisor](#)
- [Reference Documents](#)
- [License Management](#)
 - Please note that the license management functionality will be available for Codebeamer product starting from approximately February 2024. In the meantime, if you have License request for your Codebeamer application: To request a license for your Codebeamer product on the [My PTC Assistant](#) page in the coming months, please follow these steps: Select "License Management" on the page and choose the necessary option.
- [PTC University](#) (product trainings)