



CLIENT SERVICES GUIDE

V 1.4
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Ormed's helpdesk system is used for submitting, tracking, and handling Ormed software issues and enhancement requests.

Send one issue or enhancement request per e-mail to the appropriate Client Services team. Each issue is logged, assigned to an Ormed employee, and handled in order of priority level. Priority is given to written support requests before telephone support requests. Each enhancement request is logged, compiled for discussion within the larger Ormed community on a regular basis, and considered carefully for inclusion in a future release.

Issues

Note: If an issue is preventing you from performing a crucial task (i.e., running your payroll), e-mail the issue and call us immediately. A Client Services Analyst will then help you resolve the issue.


Include any Ormed Exception Tracking System messages in your e-mail as this technical information may include an explanation for the cause of the issue and can be vital in resolving the issue. You no longer need to fax Ormed Exception Tracking System messages.

To e-mail an issue to Ormed:

1. Open a new e-mail message.
2. Enter the appropriate Client Services e-mail address:

Finance Management, Discovery	fms_support@ormed.com
Med-Link	mlms_support@ormed.com
Supply Chain Management	scms_support@ormed.com
Human Resources Management	hrms_support@ormed.com
E-Commerce, Ormed-X	ecms_support@ormed.com
Systems Management	sms_support@ormed.com
Accounts Receivable Management	arms_support@ormed.com

3. In the subject line, enter the software suite acronym, application name, module name, and general problem (e.g., **FMS – Accounts Payable – Manager – login errors**).

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4. Enter all issue details step-by-step:
 - a. Which module were you using?
 - b. Which window were you in?
 - c. Which function were you performing?
 - d. What was the incorrect result?
 - e. What should have occurred?
 - f. Can you recreate the issue?
 5. Enter any recent changes made to your computer (i.e., recent software or hardware upgrades, software installs, system roll-backs or recoveries, etc.).
 6. Illustrate your issue with a screenshot if needed.
 7. If you are including an Ormed Exception Tracking System message:
 - a. Place your cursor in the Ormed Exception Tracking System message text box and press **Ctrl + A** on your keyboard. All of the text is highlighted.
 - b. Open a text application (i.e., Word, Notepad, etc.) and paste the information into the document . Save the document somewhere you'll remember.
 - c. Return to your e-mail and attach the screenshot by clicking the **Paperclip**  icon on the main toolbar (if using Lotus Notes or Outlook) or by following your e-mail system's directions for attaching files.
 8. Enter your contact information, including:
 - a. Your first and last name, and the facility name
 - b. Your phone number, with extension and area code
 - c. Ormed software module, including version number
 - d. Preferred method of contact (i.e., phone, e-mail, fax)
 - e. Best time of day to contact you
 - f. Alternate contact person
 9. Send your e-mail. You will receive an auto-reply e-mail with a case number assigned to your issue. When communicating with Ormed about this issue, quote the assigned number to ensure the Client Services Analyst can transfer you to the relevant Ormed employee.

Tip: If you do not receive an auto-reply e-mail immediately after e-mailing an issue, don't worry. It simply means our system did not immediately recognize you as a contact; you should receive an auto-reply e-mail within a few hours.

Enhancement Requests

Please make all enhancement requests using this same system. Each enhancement request is assigned to the relevant Product Manager and a list of the requests is compiled for discussion within the Ormed community at large on a regular basis. **Send one enhancement request per e-mail to the appropriate Client Services team.**

To submit an enhancement request:

1. Open a new e-mail.
2. Enter the appropriate Client Services e-mail address:

Finance Management, Discovery	fms_support@ormed.com
Med-Link	mlms_support@ormed.com
Supply Chain Management	scms_support@ormed.com
Human Resources Management	hrms_support@ormed.com
E-Commerce, Ormed-X	ecms_support@ormed.com
Systems Management	sms_support@ormed.com
Accounts Receivable Management	arms_support@ormed.com

3. In the subject line, enter the software suite acronym, application name, module name, and enhancement request (i.e., **FMS – Accounts Payable – Manager – new button**).
4. Enter a clear and detailed explanation of the requested enhancement and the reasoning behind it.
5. Enter your contact information, including:
 - a. Your first and last name, and the facility name
 - b. Your phone number, with extension and area code
 - c. Ormed software module, including version number
 - d. Preferred method of contact (i.e., phone, e-mail, fax)
 - e. Best time of day to contact you
 - f. Alternate contact person
6. Send your e-mail. You will receive an auto-reply e-mail with the case number assigned to your enhancement request. When communicating with Ormed about this enhancement request, quote the assigned number to ensure the Client Services Analyst can transfer you to the relevant Ormed employee.

Tip: If you do not receive an auto-reply e-mail immediately after e-mailing an enhancement request, don't worry. It simply means our system did not immediately recognize you as a contact; you should receive an auto-reply e-mail within a few hours.

Contact Us

Questions and Support

If you have any questions about this guide, please contact a Client Services Analyst at **(780) 482-7200**. We will be happy to assist you.

What Are Your Thoughts?

If you have any suggestions for how we can improve this document, please send them to feedback@ormed.com with the subject line **Feedback – Client Services Guide**. Your feedback assists us in better serving you.