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**PTC® Customer Service Guide:
Arbortext® Products Addendum**

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About This Guide

The *Arbortext Products Addendum* augments the *PTC Customer Service Guide* at http://www.ptc.com/support/cs_guide/index.htm. The transition to the support of Arbortext products through PTC is explained in the **Arbortext Integration Update** page:

<http://www.ptc.com/company/arbortext>

Refer to the *PTC Customer Service Guide* for descriptions of services provided through Technical Support, the Customer Care Center (including License Management, Maintenance Support, Training, and Consulting), and the PTC Web site. The guide also provides general information on how to contact PTC (Parametric Technology Corporation).

Technical Support

Contact Technical Support via the PTC Web site, phone, fax, or e-mail if you encounter problems. For information on how to contact PTC Technical Support, see *Opening and Tracking a Call to Technical Support* in chapter 5 of the *PTC Customer Service Guide* on the PTC Web site:

www.ptc.com/support/cs_guide/index.htm

You must have a Service Contract Number (SCN) before you can receive technical support. If you do not have an SCN number, contact the PTC Maintenance Department by calling the Customer Care line (listed in the back of this guide) or by using the online Customer Care Call Logger at

www.ptc.com/appserver/cs/cust_care_call_logger/CustomercareCallLogger.jsp

Comments

PTC welcomes your suggestions and comments on its documentation.
Send comments to the following address:

docwebhelp@ptc.com

Please include the name of the application and its release number with your comments. For online books, provide the book title.

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Arbortext Products and Technical Support Services

This addendum to the *PTC Customer Support Guide* provides guidelines to using PTC Technical Support for Arbortext products. It describes the services available through Technical Support, Customer Care, and Consulting. The transition to the support of Arbortext products through PTC is explained in the **Arbortext Integration Update** page at <http://www.ptc.com/company/arbortext>.

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Overview

Support services for your Arbortext products and customized applications are as important as their features and functions. PTC offers a broad spectrum of quality services for Arbortext customers, including the following:

- Custom Application Development and Support
- Training Services
- Support for Arbortext Integrations with Partner Products
- Technical Support

Custom Application Development and Support

Custom applications enhance products to satisfy specialized requirements. An in-house developer, PTC Consulting Services, or a third-party developer can create them for you. If you need consulting services to assist with development or support of a custom application, contact your PTC Sales Representative.

See Chapter 2, Customer Care Center, in the [PTC Customer Service Guide](#) for more information about consulting and PTC Global Services.

Training Services

PTC Training Services offers a comprehensive curriculum and solid instruction in XML, SGML, and Arbortext products. You can opt for standard or customized courses at a PTC facility or at your site.

PTC instructors are experienced and skilled Arbortext product users with thorough knowledge of XML and SGML concepts. They facilitate structured, hands-on interactions and the exchange of techniques and technical information.

See the PTC web site at <http://www.ptc.com/services/training> for training classes, schedules, and other options. In addition, see Chapter 2, Customer Care Center, in the [PTC Customer Service Guide](#) for more information about Training Services.

Support for Arbortext Integrations with Partner Products

Arbortext products integrate with a number of PTC partner products, such as content management systems. If you encounter a problem relating to both an Arbortext product and a partner product, Technical Support will work with you and our partner to resolve the problem. If

the problem lies solely with the partner software, you will be asked to contact the partner directly for further support.

If PTC Global Services developed the interface, contact them directly for support. If PTC did not develop the interface, then contact the responsible individuals.

Technical Support

PTC Technical Support answers questions about Arbortext products and their related documentation. You are eligible for technical support and automatic product updates if you have a current maintenance agreement. Technical Support does not provide training or consulting services.

Assistance Using Arbortext Products

Technical Support for Arbortext products includes the following types of assistance:

- Product updates
- Help with installation
- How to use a product feature
- Analysis of error messages
- Identification and isolation of the source of a product problem
- Technical information, workarounds, and patches
- Submission of product problems

Exceptions and Limitations

Technical Support is only for PTC Arbortext products unless specified otherwise in your license agreement. An overview of exceptions and limitations follows:

- **Support for your operating system or third-party software**—Only Arbortext products are supported, unless the product is specifically included in your license agreement.
- **Unsupported platforms**—Subject to the terms of your license agreement, you may use Arbortext products on undocumented platforms and versions. However, PTC does not provide support under those circumstances.

- **Customized applications**—Technical Support answers simple questions and provides limited assistance. They cannot answer questions such as “What’s the best way to design my application?” or “My custom application doesn’t work. Can you help me locate the source of the problem?” For help in these areas, contact your PTC Sales Representative to get assistance from our consulting group.
- **Training**—Technical Support answers how-to questions. However, if you would benefit from product training, Training Services or Consulting Service may be recommended for more in-depth instruction.
- **Techniques and workarounds**—Solutions created by Technical Support are supported unless you are told explicitly to the contrary. PTC cannot guarantee that a workaround will not cause or solve other problems. A workaround that resolves a problem other than the one for which it was specifically developed is not supported.

Your Technical Contacts

Designate at least one technical contact to address Arbortext product issues with Technical Support. This technical contact and Arbortext product expert serves as liaison for support issues between PTC and your organization.

A qualified technical contact provides your organization with information on, and control of, your important technical relationship with PTC. When you contact PTC, Technical Support knows that you have investigated the issue and recognize it as important.

Your technical contact is the focal point for communication and cooperation with Technical Support. Your contact should be able to:

- Serve as your Arbortext product expert
- Understand technically all Arbortext products and any custom applications in place that affect PTC products
- Determine whether a particular issue is a product issue
- Support all Arbortext product users within your organization
- Respond in a timely fashion during investigations of calls

Training Services recommends training for your primary and secondary technical contacts and preferably for all Arbortext product users. PTC may refer you to training as appropriate.

Service Contract Number (SCN)

You must have a Service Contract Number (SCN) before you can create a PTC online support account or receive technical support. If you do not have an SCN number, contact the PTC Maintenance Department by calling the Customer Care line (listed in the back of the [PTC Customer Service Guide](#)) or by using the online Customer Care Call Logger at

www.ptc.com/appserver/cs/cust_care_call_logger/CustomerCareCallLogger.jsp

Obtain a PTC Online Account

Your technical contacts and users of Arbortext products should have a PTC online account. If you do not already have an online account, click **sign up here** at <http://www.ptc.com/support/support.htm>. If you are a PTC partner, register under your company name to receive the support services described in your partner agreement. If you use a third-party consultant or contractor to develop your Arbortext applications and to act as your technical contact, provide that person with your Service Contract Number (SCN). The consultant can then register for an online account in your company's name. It is your responsibility, not PTC's, to provide the SCNs to your consultants or contractors.

See the **Arbortext Integration Update** page for information about the transition from Arbortext support web sites to the PTC Technical Support web site: <http://www.ptc.com/company/arbortext>.

Submission of Issues to Technical Support

PTC requires specific information to resolve your issues. Take the following actions when submitting and working through issues with Technical Support:

- Gather data on the issue
- Prepare data for Technical Support
- Determine priority classification
- Log a new call
- Manage your calls with Call Tracker

Besides logging, tracking, and managing your calls, you can use Software Performance Reports to track your issues and you can provide feedback to PTC online or by phone.

Gather Required Data on the Issue

Before logging a call, gather the data to reproduce the issue. Thorough descriptions and supporting data will avoid delays in investigating and resolving your issue. PTC Technical Support may request additional information depending on the nature of the issue. When you log a call, provide the following information:

- Your Service Contract Number (SCN)
- Priority of the issue. See the [priority classifications](#) later in this document.
- Arbortext product name and release, for example, Arbortext Editor 5.2, datecode M020
 - Use the new PTC product name to file your calls. See http://www.ptc.com/company/arbortext/new_product_names.htm for the new names.
 - To determine a release, or version, and datecode, click **Help > About > Version**, for example. For a guide to terminology see http://www.ptc.com/company/arbortext/guide/guide_to_terminology.htm.
- The module, or area, of your issue, such as Fonts.
- Hardware platform and operating system version, for example, Windows 2000.
- Exact text of any error message and the error number.
- Simple example of the conditions for triggering the error message. For large sample documents and complex applications, try to duplicate the problem with a smaller document, a distributed document type, or without your application files.
- The exact steps required to reproduce the problem. After documenting the steps, try them again. Make sure the steps are reproducible before sending them to Technical Support.
- Explanatory notes regarding the problem. For example, can you reproduce the problem or does it happen intermittently? Does the problem happen to all users or a select few? Does it happen on all workstations or only selected workstations? Does it happen with only one document or many?

Prepare Data for Technical Support

Application files of various types aid Technical Support in reproducing and resolving a problem. Information on how to prepare the additional data for various products follows.

- **Arbortext Editor, Arbortext Styler, Arbortext Architect (Test Editor), and Arbortext PE Interactive (formerly E3 Interactive)**—To save your application files, open the source document, and then select **Tools > Save Application**. Zip the files. They may be attached to your call as you log it using the Call Tracker tool on the PTC Technical Support web site.

Note: When using version 4.3.1 and later, enter the `appsave` command in the Command window. When using version 4.3 and earlier, enter the `bugsave` command in the Command window.

The files saved include the document instance, stylesheet, document type, custom programming files, and environment information. If your customization is nonstandard, all of the necessary application files may not be included. Review the contents of the `appsave` folder before submitting it to Technical Support. Make sure that required files are included. If Technical Support is unable to reproduce the problem, additional information or files may be requested.

For details on using the `appsave` command, go to the **Help-Topics** menu, click the **Search** tab, and enter `appsave` in the text box.

- **Arbortext Publishing Engine, Arbortext Contributor, Arbortext Dynamic Link Manager**—Technical Support will work with you to obtain application files on the Arbortext Publishing Engine server.
- **Arbortext Advanced Print Publisher (formerly 3B2)**—Prepare a scaled-down, *.3d file that exhibits the problem. Zip the file with all its referenced graphics.

Determine Priority Classification

Call priority identifies the severity of your issue:

- Enterprise Down
- Extremely Critical
- Critical
- Urgent

- Not Critical

For detailed information on call priority classification, see Chapter 5, Contacting Technical Support, in the [PTC Customer Service Guide](#).

Log a New Call

After you have compiled the information and files to help PTC reproduce and resolve your issue, log the call. You can log a call in any of the following ways:

- Use the Call Logger tool on the Technical Support web site at <http://www.ptc.com/support/support.htm>.
- Send e-mail.
- Use the telephone.

See Chapter 5, Contacting Customer Support, in the [PTC Customer Service Guide](#) for more instructions. Phone numbers are at the back of that guide.

Manage your Logged Calls with Call Tracker

In addition to providing tools for logging your issue, the Call Tracker on <http://www.ptc.com/support/support.htm> provides online tools for the following purposes:

- Adding notes
- Submitting attachments
- Escalating and managing your issues

For more information on tracking calls, see Chapter 5, Contacting Technical Support, in the [PTC Customer Service Guide](#).

Escalation of Issues, SPR Tracking, and Feedback

PTC Technical Support provides multiple mechanisms for escalating technical issues with the software and tracking your software issues. Feedback is always welcome.

Escalate Calls

You can increase the priority of a call or, if necessary, escalate a call to technical support management. For information on call escalation, see Chapter 5, Contacting Technical Support, in the [PTC Customer Service Guide](#).

Track Software Performance Reports

Software Performance Reports (SPRs), formerly *Change Requests (CRs)* in Arbortext systems, help in tracking your software issues. For information on SPRs and how to track them, see Chapter 5, Contacting Technical Support, in the [PTC Customer Service Guide](#).

Provide Feedback on the Quality of Technical Support

To provide feedback on the quality of technical support, contact the Technical Support Feedback Line. Use a toll-free number at the end of the [PTC Customer Service Guide](#) or use the Technical Support Feedback form at <http://www.ptc.com/support/feedback/ts.htm>.

Enhancement Requests

An enhancement is an idea or suggestion that PTC can evaluate for possible inclusion in a product release. The Enhancement Request Logger on the Technical Support web site allows you to submit your enhancement requests. Enhancement requests are routed directly to PTC Product Management from the Enhancement Request Logger:

http://www.ptc.com/appserver/cs/misc/PTC_Enhancement_Process.jsp

For more information on submitting enhancement requests, see Chapter 5, Contacting Technical Support, in the [PTC Customer Service Guide](#).

License Management Issues

License Management support for Arbortext products is available from PTC. Information on contacting License Management, getting a PTC online account, and licensing tools follow.

How to Contact License Management

You can contact License Management for Arbortext products in two ways:

- E-mail license related questions and request to arbortext-licenses@ptc.com.
- Call license management at one of the numbers listed on <http://www.ptc.com/olm/contacts.htm>.

Online Account Information

To use the license management tools, you must have both an Arbortext and a PTC online account.

Existing users—Use your Arbortext login for your Arbortext and PTC accounts.

New users—Create a login for both an Arbortext and a PTC account. You need your Service Contract Number (SCN) to create an account for the following purposes:

- Arbortext account for licensing

<https://www.arbortext.com/support/html/register.asp?Update=False>

- PTC account for text support and software updates. This account will not be linked to your PTC web account.

<http://www.ptc.com/support/support.htm>

With a PTC online account, both existing and new Arbortext users can access the license management tools at on the **Order and License Support** page at <http://www.ptc.com/olm/index.htm>.

Arbortext Licensing Tool

If you have an online account with PTC, you can use the Arbortext Licensing Tool at <https://www.arbortext.com/support/html/login.asp>.