# Emerson Automation Solutions

## Technical Support & Case Management Guide

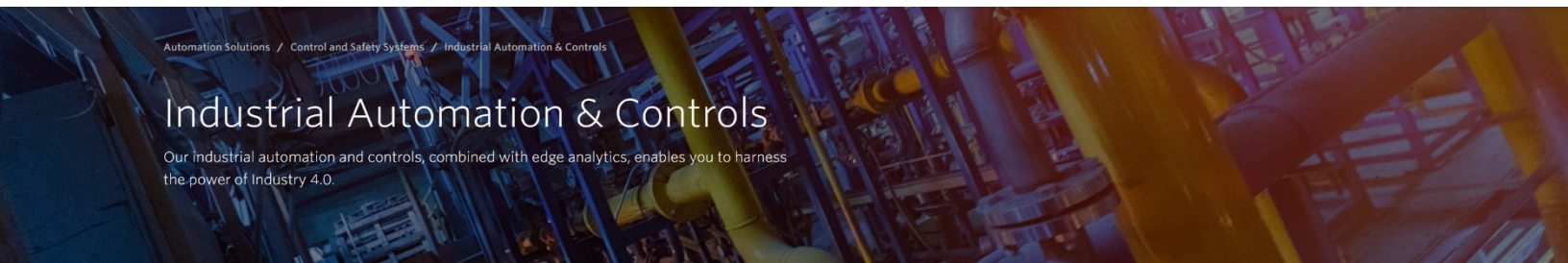**EMERSON**™

## Contents

# Section 1:  Introduction

## 1.1        WELCOME!

You need fast, effective solutions throughout your product lifecycle to maximize your technology investment and maintain a competitive edge in today's connected world. You need easy access to deep product expertise when it comes to solving your toughest problems. You need the peace of mind that comes from having an emergency lifeline in critical plant down situations. You need the flexibility to modernize your technology investment in a way that minimizes cost, impact, and risk – when it's most convenient for you. This is what our customers count on – and more – from their annual Support investment!

The goal of Emerson Machine Automation Solutions' Technical Support Team is to provide World Class Service to our  customers with every interaction. The following document describes our processes and approach to working with customers on technical support issues and inquiries for our products.



**DISCLAIMER:** This document is a procedural guideline of Emerson Machine Automation Solutions and is subject to change at Emerson's discretion at any time with or without notice.  It is provided for informational purposes only. Emerson makes no representation or warranty, whether express, implied, or statutory, with respect to, and assumes no responsibility for, the accuracy, completeness, sufficiency, or reliability of the guideline, and disclaims any liability of any kind whatsoever for any claims resulting from the disclosure of, or any reliance upon, or any conformance or non-conformance to, the guideline. No warranties of merchantability or fitness for a particular purpose shall apply.

# Section 2:  Contacting Technical Support

Emerson Machine Automation Solutions offers a variety of ways for customers to obtain technical support for our  Products. This section describes the methods available and gives guidance on initial response times and recommended usage.

## 2.1        Primary Support

Primary Support provides you access to the customer support center website which includes comprehensive online resources that are available 24/7. This is a self-service portal that allows you to manage technical support cases, access knowledge articles, and download product updates. The customer center web portal is available 24/7. Visit the portal to find the answers, solutions and resources you need in real time. Search technical articles, best practices, tips and tricks, product documentation, download service packs and software improvement modules (SIM), and have real-time access to product alerts and videos.

Primary support helps you stay ahead of the technology curve with the latest software releases, including service packs and major new releases.

Primary Support delivers access to experts to troubleshoot and address system failures. Slower repair times lead to longer production downtime. Troubleshooting a problem or fixing a system can cost significant time and money. Our experts are always available to help you solve your greatest challenges and most critical issues. Emerson's professionals work closely with the engineering and customer response teams, and have been equipped with the tools and information they need to support the customer and answer day-to-day questions.

https://emerson-mas.force.com/communities/en_US/Article/Primary-Support-Announcement-Technical-Support

## 2.2        Hours of Operation

Emerson Machine Automation Solutions' Regional Technical Support Centers are open during the following business hours, exclusive of regionally observed holidays.

| | |
|---|---|
| Americas | Monday – Friday 8:00 am to 6:00 pm Eastern Standard Time |
| Asia Pacific | Monday – Friday 9:00 am to 5:30 pm Beijing Time |
| Europe, Middle East, and Africa | Monday – Friday 8:00 am to 6:00 pm Central European Time |

## 2.3        Customer Center

Customer Center is a self-service portal that allows customers to manage support cases, access the KnowledgeBase, and participate in communities to find the answers and solutions to product issues.

Visit the Customer Center Portal at https://emerson-mas.force.com/communities/CC_Contact

**KNOWLEDGE**: Search technical articles, download Service Packs and SIMs, and obtain product manuals and eBooks. The KnowledgeBase is available 24x7.  Visit it first to find answers and solutions to product issues.

**CASES**: Create and update support cases online and view their case history.

**RESPONSE TIMES**: For technical support cases created online in Customer Center, the Support Team targets to provide a meaningful response within one local business day.

## 2.4        Local Representatives

Emerson Machine Automation Solutions' Representatives are located around the world to provide local assistance. Customers are encouraged to work directly with their local Representative for any Emerson Machine Automation Solutions' product issues. Automation Specialists are available to assist customers with technical product issues.

Look up a local representative at https://www.emerson.com/en-us/where-to-buy

**RESPONSE TIMES:** Local Representatives respond to inquiries as quickly as possible.  Hours of operation may vary.

## 2.5        Emerson Machine Automation Solutions' Technical Support Centers

Call your Emerson Machine Automation Solutions' Regional Technical Support Center for technical assistance. For easiest call routing, customers should have their Customer Service Number (CSN) and/or case number available.

**AMERICAS**   Toll-free         1-888-565-4155 (Language: English)
                 Toll              1-434-214-8532 (Language: English)

              Technical Support: support.mas@emerson.com

              Customer Care (Quotes/Orders/Returns): customercare.mas@emerson.com

**ASIA PACIFIC**  Toll-Free(China)    +86-400-842-8599 (Languages: Chinese, English)
                  Toll (China)        +65-6955-9413 (Languages: Chinese, English)

              Technical Support: support.mas.apac@emerson.com

              Customer Care (Quotes/Orders/Returns): customercare.cn.mas@emerson.com

**EUROPE, MIDDLE EAST, AFRICA**

Free phone        +800-4444-8001 (English, German, Spanish, Italian)
Toll                    +420-225-379-328 (English, German, Spanish, Italian)
Toll                    +39-0362-228-5555 (from Italy)

Technical Support: support.mas.emea@emerson.com

Customer Care (Quotes/Orders/Returns): customercare.emea.mas@emerson.com

**RESPONSE TIMES:** Calls to the support centers are answered as quickly as possible and customers will be routed directly to support engineers knowledgeable in Emerson Machine Automation Solutions' products.

**LANGUAGE SUPPORT:** We offer support in the languages listed for the different regions. Please note there may be times when staff availability for some languages and product combinations is limited. Local Representatives and CSPs may also provide additional local language support.

## 2.6        24 x 7 Emergency Support

During non-business hours and holidays Emerson Machine Automation Solutions provides emergency technical support services for critical priority plant-down emergency situations. 'Critical priority' is further defined in this document in the *Case Priorities* section.
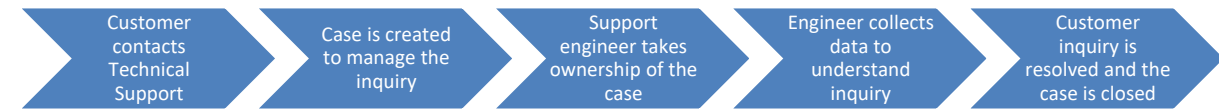
To obtain emergency technical support, call a Emerson Machine Automation Solutions' Technical Support Center, follow the normal prompts to technical support, and leave a message for a support engineer on call.

**RESPONSE TIMES:**  The on-call support engineer will contact the customer and work to resolve the emergency situation with a goal of responding to customers within fifteen minutes of a request for emergency support.

# Section 3: Standard Case Process

When a Customer contacts the Support Team with a question or product issue, the following summarizes the process used to communicate and document the interaction.

**Figure 1: High Level Case Process**

| Customer contacts Technical Support | Case is created to manage the inquiry | Support engineer takes ownership of the case | Engineer collects data to understand inquiry | Customer inquiry is resolved and the case is closed |

## 3.1 Case Creation

Each issue a customer reports will be documented within Emerson Machine Automation Solutions' Case Management System and will be assigned a unique case number. All information and communication regarding the issue is entered under this case number and is kept in the Case Management System for later reference. Customers can access the Case Management System and view case details via Customer Center at https://emerson-mas.force.com/communities/CC_Home.

When contacting the Support Team, customers should be prepared with the following information:

- Customer Service Number (CSN) and contact information

- The catalog number and version(s) of the product(s)

- The version of the software

- A description of the request

- The urgency and impact of the request

- A backup of the application

- For controllers, PacsAnalyzer logs

## 3.2 Case Ownership

While the case is being worked, a support engineer will be designated as the case owner. The case owner is responsible for all communication with the customer and for documenting case work in the technical support case. Depending on circumstances, ownership may change during the lifecycle of a case.

## 3.3 Case Communication

The case owner will attempt to resolve cases on the first customer contact. If the case owner is successful, information regarding the issue will be documented in the case and the case status will be set to 'Closed'. See the *Case Status* section of this guide for more information on case statuses.

For cases which require ongoing investigation, the case owner will discuss the next technical actions with the customer and agree on the case priority and next communication. As troubleshooting and case work continues, the case owner will communicate with the customer based upon a mutually agreed frequency.

## 3.4    Case Resolution

The  Support Team provides resolutions for technical support cases in a variety of ways including providing answers and instructions; giving basic application advice; and by providing existing SIMs or Service Packs.

For some product issues there may not be an immediate resolution and the team will work with the customer to determine how to best address the issue. Possible case paths include addressing the issue in a new SIM or Service Pack; considering the issue for inclusion in a new product release; or working with a Service Provider to develop a custom solution. See the sections on *Product Improvements* and *Application Support* for more information.

# Section 4: Case Priorities

All cases are assigned a case priority based on the impact and urgency of the issue. The Support Team uses case priorities to help determine the order of precedence for managing their workload. The case owner will discuss the case priority with the customer to ensure the impact and urgency of the issue are understood. The case priority may change during the lifecycle of the case. Below are the definitions of case priorities in order from the highest to lowest priority.

## 4.1    Severity 1 (CRITICAL)

**IMPACT**: A total system outage that is causing severe disruption to production and substantial financial loss.

**URGENCY**: Immediate attention is needed to restore production, outside normal business hours if necessary.

**COMMUNICATION FREQUENCY:** Critical priority cases will be worked continuously with the customer until the outage has been addressed. If there is additional work to complete after the outage has been addressed, the case priority may be lowered. Cases cannot be set to critical priority from the Customer Center portal. Call a local support center to report critical priority issues.

## 4.2    Severity 2 (HIGH)

**IMPACT**: The issue impacts a production system, data integrity, or production features; or the issue creates an impediment to development work and project completion.

**URGENCY**: Needs attention and resolution as soon as possible. Cases worked during normal business hours.

**COMMUNICATION FREQUENCY**:  The case owner will communicate with the customer at an agreed upon rate, typically every other business day, until the case has been resolved.  If a reasonable workaround has been provided, the case priority may be set to a lower priority to complete case work.

## 4.3    Severity 3 (MEDIUM)

**IMPACT**: This is the default priority given to any case. This priority is appropriate for general product or feature issues, development issues, and product questions.

**URGENCY**: Normal urgency. Cases worked during normal business hours.

**COMMUNICATION** FREQUENCY: The case owner will communicate with the customer at an agreed upon rate, typically at least once a week, until the case has been resolved.

## 4.4    Severity 4 (LOW)

**IMPACT**: Informational request, question, or minor problem.

**URGENCY**: No urgency to the issue.

**COMMUNICATION FREQUENCY**: The case owner will communicate with the customer at an agreed upon rate until the case has been resolved.

# Section 5:  Case Status

Each technical support case is assigned a case status to identify the stage and awaiting actions of the case. The status of a case is maintained in the Case Management System and is updated as the case progresses to resolution. Below are the most common case statuses used.

## 5.1    Technical Support Case Statuses

**SUPPORT INVESTIGATE** - The case is being investigated by the case owner and the  Support Team.

**CUSTOMER ACTION** – The customer has actions or tasks to complete before support investigation can continue.

**SOLUTION PROVIDED** – A solution has been provided and is being implemented or verified by the customer.

**ENG INVESTIGATE** - The issue requires product code changes or code-level troubleshooting and is under investigation by engineering (product development) resources.

## 5.2    Closed Statuses

Cases are closed when there is no further communication to take place on an issue. In the event that a case owner does not hear back from a customer, the case owner will try at least twice to contact the customer before closing the case. The case will remain open for a minimum of two weeks pending a reply from the customer. When appropriate, closed cases can be re-opened to re-investigate an issue. Contact a local Representative or Technical Support Center to request that a case be re-opened.

**CLOSED** – Issue has been resolved, customer and case owner have agreed to no longer pursue the issue, or no response was received from customer.

**CLOSED ADMIN** – Case has been closed due to an administrative issue (i.e. duplicate case record).

# Section 6:  Product Improvements

This section describes the processes used for code changes or documentation changes to products.

## 6.1     Hardware/Firmware– Software SIMs and Service Packs

When the  Support Team has determined that a case requires product/code level investigation, they will change the case status to 'Eng Investigate'. The case owner will communicate information to the customer at an agreed upon frequency while the issue is being investigated. Firmware changes will be packaged into an upgrade package.  If SW code changes are made, they will be packaged into a SIM (Software Improvement Module) or Service Pack. See the *Product Version Support* section for more information. Cases are worked by priority to ensure the most urgent and important SIMs and Service Packs are delivered quickly.

If it is determined that the issue will not be addressed in a hardware or software update, the case owner will discuss the details of the decision with the customer, the issue may be logged to be addressed in a future product release cycle, and the technical support case will be closed.

## 6.2     Product Suggestions

If a customer has a suggestion for new product functionality or features, a support engineer will document the suggestion within a technical support case, flag the case as an enhancement request, and close it. The request will be considered by our product management team. Customer feedback and suggestions are highly valued by Emerson Machine Automation Solutions - all suggestions logged in cases are reviewed by technical support, engineering, and marketing as part of product release cycles. While we do not typically follow-up on individual suggestions, all new features, enhancements, and bug fixes are listed in the Important Product Information (IPI) document for each product release.

## 6.3     Documentation Suggestions

If an omission or error is found in a product manual or eBook, a support engineer will document the issue in a technical support case.  Depending on the nature of the document issue, the support engineer may create an Errata entry on the related webpage or submit for additional actions by our development team.  Manuals and eBooks are updated as part of product release cycles and all documentation cases will be reviewed for inclusion. Support engineers also regularly post and update KnowledgeBase articles with product alerts, product information, and product feature examples.

## 6.4          Security Advisories and Patches

Security is, and always will be, a top priority at Emerson Machine Automation Solutions. We work with customers, industry working groups and standards bodies, government agencies, and the security research community to continually improve the security of industrial control systems and global infrastructure.

Visit our Customer Center for the latest information on product security advisories and patches, to report product vulnerability or security concerns, and to sign up to be notified of product security advisories.

# Section 7:  Product Version Support

The Support Team will respond to questions and inquiries from customers for all non-obsolete Emerson Machine Automation Solutions' products. Emerson Machine Automation Solutions will use reasonable efforts to provide assistance on products that have initiated obsolescence, however supportability may be limited.  Technical Support is available for a period of seven (7) years once a product moves to obsolete status, however, support may be very limited.

## 7.1      Product Code Changes

For hardware issues that The Support Team determines require product changes, upgrade packages will be created for active product versions that have not been moved to the obsolescence lifecycle phase.

For software issues that The Support Team determines require product changes, upgrade packages will be created for the current major version and one version prior.

Upgrade packages for all non-obsolete products are published to the KnowledgeBase and are available to active, registered  Customers.

## 7.2      Product Obsolescence

In order to allow customers ample notification, Emerson Machine Automation Solutions follows a formal process when rendering a product or release obsolete. Contact your Emerson Machine Automation Solutions' Distributor or Channel Partner for information on product obsolescence.  A product moving to Mature status is available for sale and repair of products for a minimum of two (2) years.   Near the end of the Mature status period, customers will be given a six-month notice that a product is moving from Mature to Discontinued status. At this time customers will be offered an opportunity for a "Last Time Buy." Subsequent to the Last Time Buy, orders for Discontinued products will no longer be accepted. Emerson Machine Automation Solutions will continue to service the Discontinued product, i.e., provide Repair-and-Return or Exchange modules for seven (7) years.  This limited service excludes any technical support from the Tech Support Team.  The exact time period of Mature to Discontinued status is subject to the availability of component parts.

# Section 8: Application Support & Product Training

The  Support Team is here to assist customers with a wide range of technical product issues and questions, however  Support does not include support for developing or debugging custom code, or for consultation in developing your individual application. Your system design team, system integrator, or service provider is responsible for assisting with changes to your individual application.  As such, the  Support Team may refer you to one of these resources; standard third-party charges may apply.  In addition,  Support does not include in-depth instruction or training services for using products. If a customer needs assistance learning product functionality, they may be referred to Emerson Machine Automation Solutions' Training Services which offers an extensive array of courses worldwide for our products.

Visit https://www.emerson.com/en-us/automation/services-consulting to find a Service Provider.

Visit https://emersonprocess.csod.com/GlobalSearch/search.aspx?s=1&q=plc to see available training classes and enroll in for an upcoming session.

# Section 9:  Third Party Product Support

Emerson Machine Automation Solutions publishes third party product compatibility and support information in the product eBooks and manuals. The "Technology Profile and Interoperability Matrix" also provides information on product interoperability and supported versions for Software Products, Operating Systems, and third-party technologies.

Review the manuals and IPIs installed with the product or download them from the KnowledgeBase.

## 9.1　Operating System Service Packs & Microsoft Security Updates

Emerson Machine Automation Solutions will support new Microsoft Operating System Service Packs within ninety days of their official release date for all currently shipping Emerson Machine Automation Solutions' software products.

Emerson Machine Automation Solutions will support Microsoft Critical Security Updates within seven days of their release for all currently shipping Emerson Machine Automation Solutions' software products.

Visit KnowledgeBase for detailed information on the security advisories.

## 9.2　Third Party Product New Releases

If a customer requests information regarding whether an existing Emerson Machine Automation Solutions' product version can be supported for use with a new release of a third party product, a support engineer will document the request within a case and work with Product Marketing resources to assess whether the new version can be supported within existing product releases or whether to consider it for an inclusion in a future release. The support engineer will document the supportability within a KnowledgeBase article.

## 9.3　Third Party Product Issues

In some cases the Support Team will not be able to resolve an issue because it falls outside of the scope of Emerson Machine Automation Solutions' products. For example, problems caused by underlying operating system issues, third party functional constraints, or performance limits of hardware components. The case owner will work with the customer to identify if the issue is within Emerson Machine Automation Solutions' product scope, or whether they need to pursue the issue with another vendor.

# Section 10:     Case Escalation

If a customer feels, for any reason, that their case is not progressing to their needs, they may request that their case be 'escalated'.  This method is offered beyond the normal case management process to ensure that customers have a way to raise their hand when they need additional assistance.

When a customer requests a case escalation, a Customer Advocate will review the case within two business hours and work with the customer, case owner, and other Emerson Machine Automation Solutions' resources to determine how to best address the situation. In some cases the priority may be changed, or additional resources engaged. Once the situation is addressed the case may be de-escalated and worked through the standard case process. If a case requires ongoing escalation, a customer advocate or technical manager will remain engaged with the case owner and customer to provide additional oversight and communication to ensure the case progresses to the customer's satisfaction.

The following are potential reasons why a customer may request to escalate a case:

- **CASE INACTIVITY**– Unsatisfactory rate of communication regarding status of case

- **COMMERCIAL IMPACT** –Sale, project, or contract renewal delayed pending case resolution

- **FINANCIAL IMPACT** –Unresolved issue impacts ability to make product or impacts the customer financially

- **TIME TO SOLVE** – Actively communicating but case has been open an excessive period of time


The following are ways to escalate a case:

- Escalate the case online using Customer Center or

- Contact the case owner to request they escalate the case or

- Send email to mas.sfdcescalation@emerson.com including the case number and reason for escalation.

# Section 11:    Site Visits

The  Support Team has many tools and options available to troubleshoot customer issues remotely, however occasionally on-site technical support may be necessary.  If the  Support Team and the customer mutually agree that the case is not progressing and remote options are insufficient to resolve the issue, the case owner will work with the customer to determine a plan for a site visit and coordinate resources to provide on-site assistance.

Emerson Machine Automation Solutions may require the customer to provide a purchase order prior to the site visit. The cost of the visit and a service rate may be charged to the customer if the issue is determined to be an application/integration issue and not due to a product issue.

# Section 12:     Surveys

The goal of the  Support Team is to provide World Class Service to Customers. When a case is closed a brief survey will be sent to the customer to get their feedback on the experience. All survey feedback is reviewed and valued at every level within Emerson Machine Automation Solutions – from the case owner to the CEO.

# Section 13: Glossary of Terms

**Case Management System** – A secure database used to store information and history related to technical support cases.

**Certified Solution Professional (CSP)** – An Emerson representative who has completed technical product training and exams to certify them to provide technical support to Customers.

**Customer Advocate** - A Support engineer who specializes in account management and customer service.

**Customer Center** – Website for customers to access case management tools, product downloads and orders.

**Customer Service Number (CSN)** - A unique number assigned to each customer's account. The CSN is used by Emerson Machine Automation Solutions' phone systems to allow  customers direct access to technical support.

**Community** - A section of the KnowledgeBase for customers to discuss and share information related to Emerson Machine Automation Solutions' products.

 **Support Team** - The many resources that provide support and technical assistance to Customers. This includes Emerson Machine Automation Solutions' Support Engineers, CSPs, Developers, QA Teams, Product Marketing, Documentation, and  Sales Teams.

**KnowledgeBase (KB)** - The website used to house technical product information.

**Local Representative** - Partners of Emerson Machine Automation Solutions who sell and service Emerson Machine Automation Solutions' products.

**Product Release** – A new product version (i.e. 2.0 or 2.1) or product level (i.e. 6.0 to 7.0)

**Product Release Cycle** - The stages of development from initial concept to release for hardware & software products.

**Service Pack (SP)** - An installation of product files and enhancements that will patch an entire product. Service Packs receive full regression testing to ensure complete product functionality.

**Service Provider** - Sometimes referred to as 'Solution Provider' or 'Systems Integrator'. A company that specializes in developing customer applications using Emerson Machine Automation Solutions' hardware & software products.

**Software Improvement Module (SIM)** - Also referred to as a 'hot fix' or 'patch'. An installation of product files to address a product issue in a specific area of a product. SIMs are unit tested in the areas of the product affected by code changes.

**Support Engineer** - An individual or CSP who provides technical support to customers.

**Technical Support Case** - Also referred to as 'Case' or 'Service Request'. Information, activities, communication, and files related to a particular product issue. Each case is assigned a unique case number and is housed in a Case Management System accessible to customers through Customer Center.

**World Class Service** - At Emerson Machine Automation Solutions it means listening to our customers, staffing professionals with deep technical expertise, and providing solutions that enable our customers to realize the highest possible value from their Emerson technology investments.

# Section 14:      Useful Links

| | |
|---|---|
| Emerson Machine Automation Solutions Website | https://www.emerson.com/en-us/automation/control-and-safety-systems/programmable-automation-control-systems |
| Customer Center Portal | https://emerson-mas.force.com/communities/CC_Home |
| Primary Support | https://emerson-mas.force.com/communities/en_US/Article/Primary-Support-Announcement-Technical-Support |
| Find a Local Representative | https://www.emerson.com/en-us/where-to-buy?c=180 |
| Create a Technical Support Case Online | https://emerson-mas.force.com/communities/CC_Contact |
| Find a Service Provider | https://www.emerson.com/en-us/automation/services-consulting |
| Get a map of the Support Phone System | https://emerson-mas.force.com/communities/en_US/Article/Phone-Navigation |
| Get Product Training | https://www.emerson.com/en-us/automation/services-consulting/educational-services |
| Create a Support User Account | https://emerson-mas.force.com/communities/CC_SignupPassword |