

## **CS Gold Spring Semester Start & End procedures**

### ***Introduction***

The New Year is quickly approaching, which for many of you is soon followed by the start of the spring semester. As you are aware, call volume during semester start-up time is generally higher, leading to increased wait times when you contact Support.

We're sending you this notification to provide some guidelines and resources to assist you during this time. The guidelines and information are designed to help reduce overall call volume and help streamline calls to Support. Our goal is to reduce wait times and provide quicker resolutions when you contact Support.

Please review the guidelines and the information relevant for your site at your earliest convenience. As always, if you have any questions, feel free to contact Support at (866) 789-2977.

We look forward to working with you to ensure a successful start to the spring semester.

### ***Guidelines***

#### **Terminal Maintenance**

When terminals are powered off, moved, or left unattended for a period of time between semesters, there is always a possibility that the terminal may not operate correctly when you begin using it again.

We recommend that you verify that all terminals are online and fully functional at least one week before the semester begins. This will give you time to work with Support to clear up any issues that arise prior to the time when the terminal needs to be used.

#### **Software Maintenance**

Oftentimes, you need to make changes to the configuration of your system software between semesters. Common examples of this include adding/removing Meal or SV&C Plans and adding/modifying/removing Access or Meal Schedules.

In addition, you may need to change patron privileges between semesters, either manually or through Patron Imports. Common examples of this include assigning/changing/removing Meal or SV&C Plans, assigning/changing/removing Access Schedules, adding/removing funds from Meal or SV&C Plans, adding/changing/removing Flags, and changing Active status.

We recommend that patron privilege changes, whether done manually or through Patron Imports, be verified on test accounts prior to being made to patron accounts. We also recommend that you verify all system software configuration changes and patron privilege changes at least one week before the semester begins, where feasible. This will give you time to work with Support to clear up any issues that arise prior to when those issues would negatively impact your patrons.

## Support Guidelines

When preparing to call the support line, please consider the following checklist:

1. Gather information before calling.
  - a. Obtain the version of the hardware and/or software for which you need assistance.
  - b. Copy the exact wording of any error messages that are displayed.
  - c. Be prepared to discuss exactly what troubleshooting has already been performed.
  - d. If the error can be duplicated, obtain detailed system logs.
    - i. Set the MPP debug to 7.
    - ii. Run the transaction, noting the exact steps that were performed and the result, including any informational or error messages.
    - iii. Set the MPP debug back to 0.
2. Ensure that Support can access the TPS and/or DB, if needed.
3. Determine where it will be most efficient for you to be when talking with Support, whether in your office, at the server, or at a device in question.

## Online Resources

<http://www.cbord.com> is the company home page with general information and links to our Support page and to the eSupport web portal.

<http://www.cbord.com/support> is the Support and Training page with links to CS Gold® information, webinars, and eSeminars.

<http://cs.cbord.com> is the CS Gold Support page with links to product information, email distribution list information, and requests for Return Authorization Numbers.

<http://esupport.cbord.com> is the eSupport web portal page through which you can create support cases, read the case notes detailing what work has been performed on existing support cases, add notes to existing support cases, and close support cases.

## Troubleshooting Primer

When troubleshooting problems, here is a useful checklist for working through an issue.

1. Has it ever worked?
2. Is it working elsewhere?
3. When did it stop working?
4. What changed before it stopped working?
  - a. Consider hardware, software, cabling, and network in this question.
5. Does it work if swapped with a known good location?
  - a. Take the non-working unit to a working location and try it there.
  - b. Take a working unit to the non-working location and try it there.
6. Keep asking questions. Oftentimes the person who reported the question does not know what information is relevant, so you must keep mining for that golden nugget of information that may help explain why the problem is occurring.