

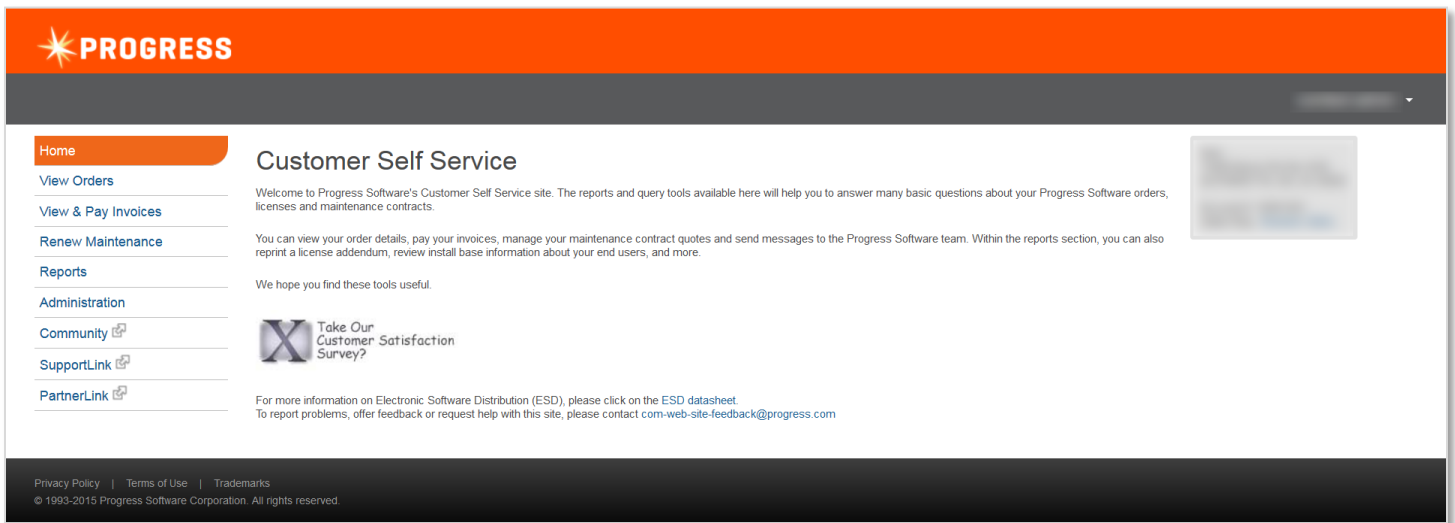
User Guide

Customer Self Service (CSS) Web Application

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Welcome



Welcome to the Progress Software Customer Self Service Website. This site is designed to give Progress customers, like you, the tools needed to manage your Progress account.

This document will introduce you to the tools available on the site and provide help in using them.

- **Real time order status** – View your orders as they transition through Order Confirmation, Shipment and Invoicing
- **Pay Invoices** – Advanced search routines allow you to quickly find the invoices that need to be paid and submit your payment online.
- **Renew Maintenance** – Review your maintenance quote lines and submit your approvals.
- **Enhanced reports** – Run a number of license related reports such as an enhanced versions of our License History and Media Status Reports.

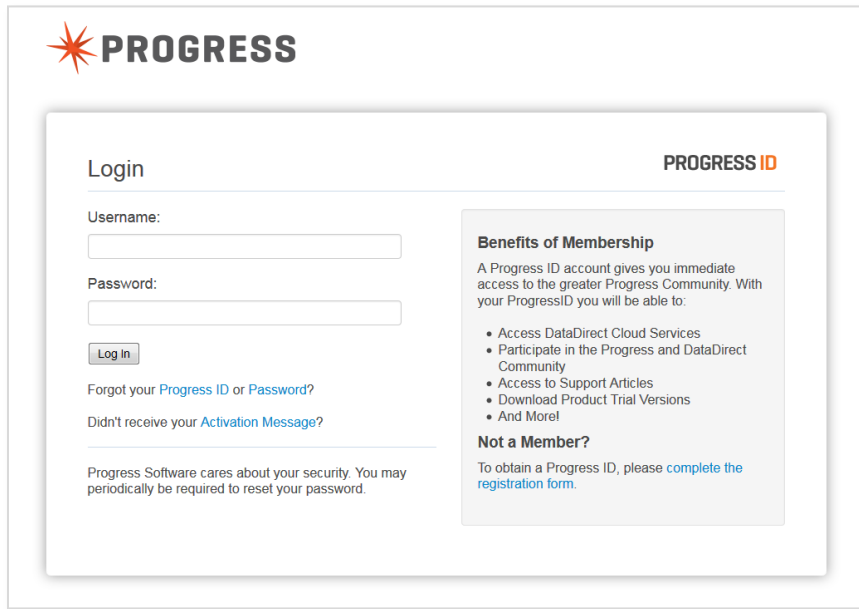
While this site already offers a lot of great features, the Progress development team is actively working to bring you even more. In the coming months, look for some of our upcoming features such as online ordering, standard upgrades, expanded payment options and a new Home Page that give you a summarized view of your important account information.

At Progress, we value you as a customer and welcome your feedback. If you have any ideas or suggestions that can make the site work even better for you, please email them to com-web-site-feedback@progress.com.

Accessing the Customer Self Service (CSS) Web Application

<https://secure.progress.com/custserv>

Only authenticated users can access to the CSS Web Application using their Progress ID. If you need to register for a Progress ID and/or password, or if you forgot your Progress ID and/or password, please use help links on the login page.



The screenshot shows the Progress ID login page. At the top left is the Progress logo. The main heading is "Login" with "PROGRESS ID" in the top right corner. There are two input fields for "Username:" and "Password:". Below the password field is a "Log in" button. There are two links: "Forgot your Progress ID or Password?" and "Didn't receive your Activation Message?". A grey box on the right contains the "Benefits of Membership" section, which lists: "Access DataDirect Cloud Services", "Participate in the Progress and DataDirect Community", "Access to Support Articles", "Download Product Trial Versions", and "And More!". Below this is the "Not a Member?" section, which says "To obtain a Progress ID, please [complete the registration form](#)". At the bottom left, a note states: "Progress Software cares about your security. You may periodically be required to reset your password."

View Orders

The View Orders page is designed to provide an interactive view of current and past orders. Below are some of the features that make finding your orders fast and simple.

The screenshot shows the 'View Orders' page with a navigation menu on the left and a main content area. The main content area includes a search filter for 'Date' set to 'Last 90 days', a 'Search / Refresh' button, and a table of orders. Two callouts point to the search filter and the table.

Order	Purchase Order	Order Date	Bill To	Ship To	Currency	Order Total	Credit Terms	Delivery Type	Order Status	Invoice
US136325		17-Jun-2015			USD	228.38		INVOICE	INVOICED	
US136328		17-Jun-2015			USD	405.81		INVOICE	INVOICED	
US136354		17-Jun-2015			USD	78.95		INVOICE	INVOICED	
US136360		17-Jun-2015			USD	888.20		INVOICE	INVOICED	
US136361		17-Jun-2015			USD	1,550.22		INVOICE	INVOICED	
US135891		04-Jun-2015			USD	0.00		INVOICE	Confirmed	
US135868		04-Jun-2015			USD	11,482.35		NONE	INVOICED	
US135771		02-Jun-2015			USD	0.00		ESD	INVOICED	
US135780		02-Jun-2015			USD	5,881.38		ESD	INVOICED	
US135783		02-Jun-2015			USD	89.04		INVOICE	INVOICED	

Order Search Criteria

Using the Order Search Criteria, you can look for your orders by Order Date, Order Number or Purchase Order Number.

The screenshot shows the 'View Orders' page with the 'Date' dropdown menu open. The menu options are: Last 90 days, Last 30 Days, Last 60 Days, Last 6 months, Last 1 year, 2015, 2014, 2013, 2012, and Custom. The 'Last 90 days' option is selected.

To search by Order Date, select one of our pre-defined date ranges or choose “Custom” to enter your own date range.

View Orders

Here you can review all past and current orders of status Confirmed, Shipped or Invoiced

Order Date
 Order Number
 Purchase Order

Date: From To

Order	Purchase Order	Order Date	Bill To
US134603		08-May-2015	
US133162		03-Apr-2015	
US133244		07-Apr-2015	

March 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Wednesday, July 01, 2015

Enter Custom Dates by using the interactive calendar. Use the arrows to scroll between months, or simply click on the month name to open up additional search options.

View Orders

Here you can review all past and current orders of status Confirmed, Shipped or Invoiced

Order Date
 Order Number
 Purchase Order

Search:

Select Order Number to search for a specific order.

View Orders

Here you can review all past and current orders of status Confirmed, Shipped or Invoiced

Order Date
 Order Number
 Purchase Order

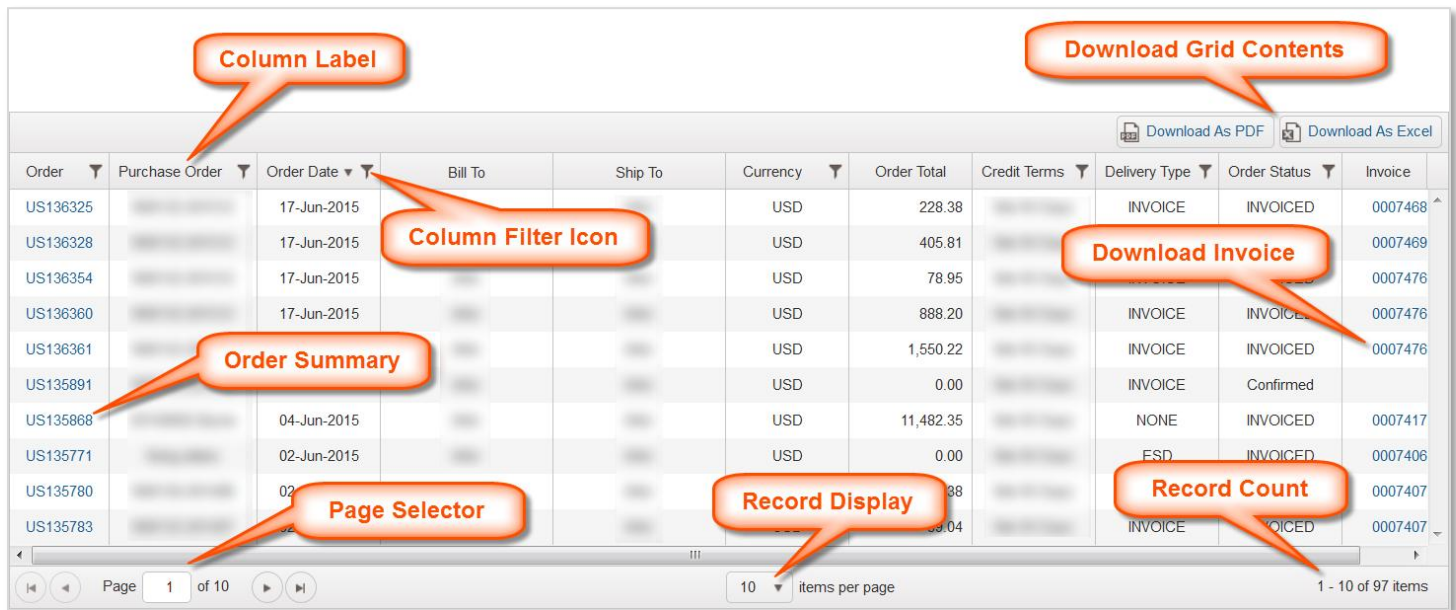
Search:

Select Purchase Order to search for orders that reference a specific Purchase Order Number.

After defining your search criteria, simply press “Enter” or click to populate the Order Grid with your Order Selection results.

Order Grid

The Order Grid provides an Interactive view of your orders.



The screenshot shows an Order Grid with the following columns: Order, Purchase Order, Order Date, Bill To, Ship To, Currency, Order Total, Credit Terms, Delivery Type, Order Status, and Invoice. Callouts point to various features: 'Column Label' points to the 'Order Date' header; 'Column Filter Icon' points to a small icon in the 'Order Date' column; 'Order Summary' points to a row of data; 'Page Selector' points to the 'Page 1 of 10' navigation; 'Record Display' points to the '10 items per page' dropdown; 'Record Count' points to the '1 - 10 of 97 items' text; 'Download Grid Contents' points to the 'Download As PDF' and 'Download As Excel' buttons; and 'Download Invoice' points to the 'Invoice' column.

Order	Purchase Order	Order Date	Bill To	Ship To	Currency	Order Total	Credit Terms	Delivery Type	Order Status	Invoice
US136325		17-Jun-2015			USD	228.38		INVOICE	INVOICED	0007468
US136328		17-Jun-2015			USD	405.81				0007469
US136354		17-Jun-2015			USD	78.95				0007476
US136360		17-Jun-2015			USD	888.20		INVOICE	INVOICED	0007476
US136361					USD	1,550.22		INVOICE	INVOICED	0007476
US135891					USD	0.00		INVOICE	Confirmed	
US135868		04-Jun-2015			USD	11,482.35		NONE	INVOICED	0007417
US135771		02-Jun-2015			USD	0.00		ESD	INVOICED	0007406
US135780		02-Jun-2015			USD	0.00				0007407
US135783		02-Jun-2015			USD	0.00		INVOICE	INVOICED	0007407

Sorting

Sort the grid results by simply clicking the Column Label on the column you wish to use for sorting. Click once to sort ascending. Click again to sort descending. Click a third time to remove the sorting on the column.

Filtering

Click on a column's Filter Icon to display advanced filtering options.

Page Selection

Use the arrows to scroll between pages or enter a specific page number to jump directly to a page.

Record Display

Use the record display selector to increase the number of rows to include on each page.

Record Count

The Record Counter is a quick way to see how many records are currently being displayed in the

Download Grid Contents

Use the Download buttons at the top of the grid to download the Grid Contents to an Excel or PDF file. Use the Search Criteria or the column level filtering to control exactly which records will be exported.

Download Invoice

Click on the Invoice Number to download your invoice in PDF format.

Order Summary

Click on the Order Number to display the Order Summary.

PROGRESS

Home
View Orders
View & Pay Invoices
Renew Maintenance
Reports
Administration
Community
SupportLink
PartnerLink

Order Summary - US138106

Order Date: Wed Jun 17 01:00:00 EDT 2015

Ship & Handle: INVOICE Sales Tax: 0.0

Terms: Subtotal: 888.2

Purchase Order Number: Total Value: 888.2

Customer

Customer: Ship To:

Customer Address: Ship To Address:

Bill To

Bill To: End User:

Bill To Address: End User Address:

[Go Back to Orders page](#)

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View & Pay Invoices

The View & Pay Invoices page is designed to provide an interactive view of both your open and fully paid invoices. Below are some of the features that make finding and paying your invoices fast and simple.

Note: Progress currently offers online payments by Credit Card for USD invoices only. Credit Card Payments are also limited to \$50,000. We are actively working to provide additional payment options for both USD and other currency invoices.

The screenshot shows the 'View Invoice' page with the following features highlighted:

- Invoice Search Criteria:** A dropdown menu for 'Invoice Date' set to 'Last 1 year'.
- Log Dispute:** A 'Dispute' button next to the 'Search / Refresh' button.
- Invoice Grid:** A table listing invoices with columns for Invoice, Order, Purchase Order, Invoice Date, Due Date, Currency, Total, Amount Paid, Balance, Select for Payment, and Payment Amount.

Invoice	Order	Purchase Order	Invoice Date	Due Date	Currency	Total	Amount Paid	Balance	Select for Payment	Payment Amount	
00045464	US122464	N00132-201...	09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045468	US122477	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	547.89	547.89	0.00	<input type="checkbox"/>		View Invoice
00045469	US122478	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	809.76	809.76	0.00	<input type="checkbox"/>		View Invoice
00045494	US122511	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045495	US122512	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045496	US122513	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045500	US122518	2013	09-Jul-2014	23-Aug-2014	USD	965.55	965.55	0.00	<input type="checkbox"/>		View Invoice
00045502	US122522	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	1,831.83	1,831.83	0.00	<input type="checkbox"/>		View Invoice
00045511	US122531	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	2,766.57	2,766.57	0.00	<input type="checkbox"/>		View Invoice
00045517	US122537	20130615-PSC	09-Jul-2014	23-Aug-2014	USD	2,061.14	2,061.14	0.00	<input type="checkbox"/>		View Invoice

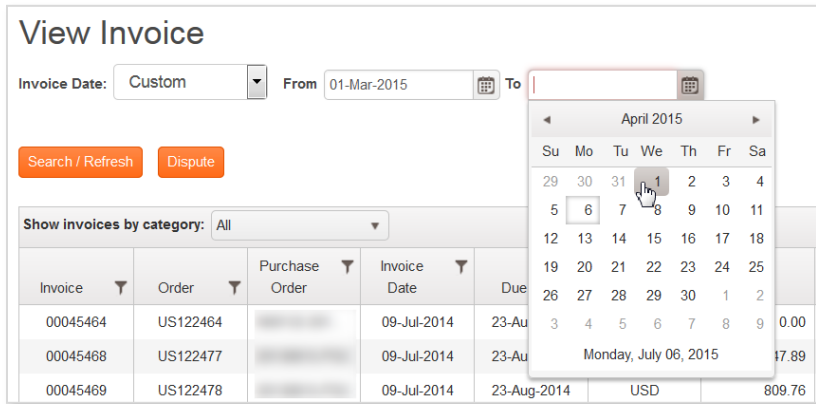
Invoice Search Criteria

Using the Invoice Search Criteria, you can find your Invoices by Invoice Date.

The close-up shows the 'Invoice Date' dropdown menu with the following options:

- Last 1 year
- Last 30 Days
- Last 60 Days
- Last 90 days
- Last 6 months
- 2015
- 2014
- 2013
- 2012
- Custom

Select one of the pre-defined date ranges or choose “Custom” to enter your own date range.



The screenshot shows the 'View Invoice' page. At the top, there is a form for 'Invoice Date' with a dropdown set to 'Custom'. Below this are 'From' and 'To' date fields. A calendar pop-up is open, showing April 2015. Below the calendar, there are 'Search / Refresh' and 'Dispute' buttons. A table below shows a list of invoices with columns for Invoice, Order, Purchase Order, Invoice Date, Due Date, and Amount.

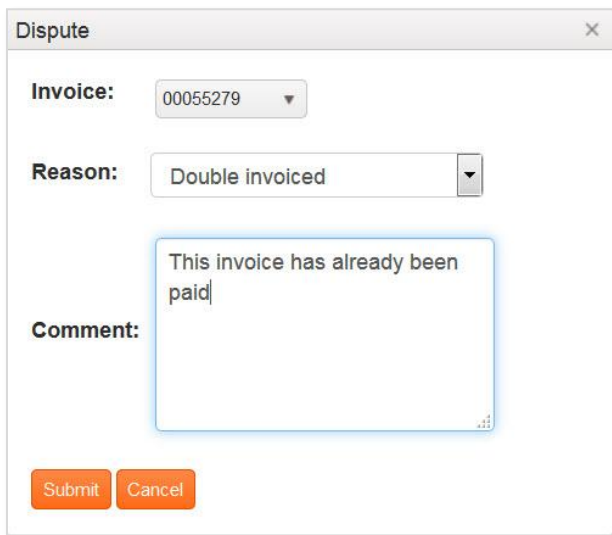
Invoice	Order	Purchase Order	Invoice Date	Due Date	Amount
00045464	US122464		09-Jul-2014	23-Aug-2014	0.00
00045468	US122477		09-Jul-2014	23-Aug-2014	17.89
00045469	US122478		09-Jul-2014	23-Aug-2014	809.76

Enter Custom Dates by using the interactive calendar. Use the arrows to scroll between months, or simply click on the month name to open up additional search options.

After defining your search criteria, simply press “Enter” or click **Search / Refresh** to populate the Order Grid with your Order Selection results.

Log Dispute

If there is an issue with any of your invoices, you can quickly log a dispute by clicking on the Dispute button and filling out the Dispute form.



The screenshot shows a 'Dispute' form with the following fields:

- Invoice:** 00055279
- Reason:** Double invoiced
- Comment:** This invoice has already been paid

At the bottom, there are 'Submit' and 'Cancel' buttons.

Simply select the invoice, choose a reason code and add your comment. The submitted form will be forwarded to the Progress Accounts Receivable group, where they will take the appropriate action.

Invoice Grid

The Invoice Grid provides an Interactive view of your Open and Paid Invoices.

The screenshot shows the Invoice Grid interface with several callouts:

- Invoice Category Selector:** A dropdown menu at the top left showing 'All'.
- Download Grid Contents:** Two buttons at the top right: 'Download As PDF' and 'Download As Excel'.
- Column Label:** A callout pointing to the 'Due Date' column header.
- Column Filter Icon:** A callout pointing to the downward arrow icon on the 'Purchase Order' column header.
- Download Invoice:** A callout pointing to the 'View Invoice' link in the rightmost column.
- Page Selector:** A callout pointing to the 'Page 1 of 21' indicator.
- Record Display:** A callout pointing to the '10 items per page' selector.
- Record Count:** A callout pointing to the '1 - 10 of 210 items' indicator at the bottom right.

Invoice	Order	Purchase Order	Invoice Date	Due Date	Currency	Total	Amount Paid	Balance	Select for Payment	Payment Amount	
00045464	US122464		09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045468	US122477		09-Jul-2014	23-Aug-2014	USD	547.89	547.89	0.00	<input type="checkbox"/>		View Invoice
00045469	US122478		09-Jul-2014	23-Aug-2014	USD	809.76	809.76	0.00	<input type="checkbox"/>		View Invoice
00045494	US122511		09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045495	US122512		09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045496	US122513		09-Jul-2014	23-Aug-2014	USD	0.00	0.00	0.00	<input type="checkbox"/>		View Invoice
00045500	US122518		09-Jul-2014	23-Aug-2014	USD	965.55	965.55	0.00	<input type="checkbox"/>		View Invoice
00045502	US122519		09-Jul-2014	23-Aug-2014	USD	1,831.83	1,831.83	0.00	<input type="checkbox"/>		View Invoice
00045511	US122520		09-Jul-2014	23-Aug-2014	USD	2,766.57	2,766.57	0.00	<input type="checkbox"/>		View Invoice
00045517	US122537		09-Jul-2014	23-Aug-2014	USD	2,061.14	2,061.14	0.00	<input type="checkbox"/>		View Invoice

Invoice Categories

The dropdown menu shows the following options:

- All (highlighted)
- Open
- Paid

Use the Invoice Category selector to view just Open Invoices, with a balance due, or fully Paid Invoices.

Sorting

Sort the grid results by simply clicking the Column Label on the column you wish to use for sorting. Click once to sort ascending. Click again to sort descending. Click a third time to remove the sorting on the column.

Filtering

Click on a column's Filter Icon to display advanced filtering options.

Page Selection

Use the arrows to scroll between pages or enter a specific page number to jump directly to a page.

Record Display

Use the record display selector to increase the number of rows to include on each page.

Download Invoice

Click "View Invoice" to download the invoice in PDF format.

Download Grid Contents

Use the Download buttons at the top of the grid to download the Grid Contents to an Excel or PDF file. Use the Search Criteria or the column level filtering to control exactly which records will be exported.

Pay Invoices

To make an online payment, find the invoices you wish to pay and check the “Select for Payment” checkbox.

Show invoices by category: Open												Download As PDF	Download As Excel
Invoice	Order	Purchase Order	Invoice Date	Due Date	Currency	Total	Amount Paid	Balance	Select for Payment	Payment Amount			
00046870	US123370		31-Jul-2014	14-Sep-2014	USD	431.44	0.00	431.44	<input type="checkbox"/>		View Invoice		
00047473	US123739		13-Aug-2014	27-Sep-2014	USD	0.02	0.00	0.02	<input type="checkbox"/>		View Invoice		
00051601	US125521		23-Sep-2014	07-Nov-2014	USD	6,743.50	0.00	6743.50	<input checked="" type="checkbox"/>	6743.50	View Invoice		
00055278	M1034935		07-Nov-2014	22-Dec-2014	USD	981.80	0.00	981.80	<input checked="" type="checkbox"/>		View Invoice		
00055279	M1034936		07-Nov-2014	22-Dec-2014	USD	2,150.97	0.00	2150.97	<input type="checkbox"/>		View Invoice		
00055280	M1034937		07-Nov-2014	07-Dec-2014	USD	1,927.46	0.00	1927.46	<input type="checkbox"/>		View Invoice		
00055281	M1034938		07-Nov-2014	22-Dec-2014	USD	1,557.23	0.00	1557.23	<input type="checkbox"/>		View Invoice		
00055282	M1034939		07-Nov-2014	07-Dec-2014	USD	787.00	0.00	787.00	<input type="checkbox"/>		View Invoice		
00055283	M1034940		07-Nov-2014	22-Dec-2014	USD	1,448.98	0.00	1448.98	<input type="checkbox"/>		View Invoice		
00055284	M1034941		07-Nov-2014	22-Dec-2014	USD	1,861.11	0.00	1861.11	<input type="checkbox"/>		View Invoice		

Page 1 of 5 10 items per page 1 - 10 of 48 items

The Invoice Balance is automatically added to the “Payment Amount” column.

Click the **Proceed for Payment** button to begin the payment process.

Show invoices by category: Open												Payment Amount	Download As PDF	Download As Excel
Invoice	Order	Purchase Order	Invoice Date	Due Date	Currency	Total	Amount Paid	Balance	Select for Payment	Payment Amount				
00046870	US123370		31-Jul-2014	14-Sep-2014	USD	431.44	0.00	431.44	<input type="checkbox"/>		View Invoice			
00047473	US123739		13-Aug-2014	27-Sep-2014	USD	0.02	0.00	0.02	<input type="checkbox"/>		View Invoice			
00051601	US125521		23-Sep-2014	07-Nov-2014	USD	6,743.50	0.00	6743.50	<input checked="" type="checkbox"/>	6743.50	View Invoice			
00055278	M1034935		07-Nov-2014	22-Dec-2014	USD	981.80	0.00	981.80	<input checked="" type="checkbox"/>	981.80	View Invoice			
00055279	M1034936		07-Nov-2014	22-Dec-2014	USD	2,150.97	0.00	2150.97	<input type="checkbox"/>		View Invoice			
00055280	M1034937		07-Nov-2014	07-Dec-2014	USD	1,927.46	0.00	1927.46	<input type="checkbox"/>		View Invoice			
00055281	M1034938		07-Nov-2014	22-Dec-2014	USD	1,557.23	0.00	1557.23	<input type="checkbox"/>		View Invoice			
00055282	M1034939		07-Nov-2014	07-Dec-2014	USD	787.00	0.00	787.00	<input type="checkbox"/>		View Invoice			
00055283	M1034940		07-Nov-2014	22-Dec-2014	USD	1,448.98	0.00	1448.98	<input type="checkbox"/>		View Invoice			
00055284	M1034941		07-Nov-2014	22-Dec-2014	USD	1,861.11	0.00	1861.11	<input type="checkbox"/>		View Invoice			

Payment Amount

Invoice Number	Amount
00051601	6743.50
00055278	981.80

Total Amount: \$7725.30

Submit Payment

Page 1 of 5 10 items per page 1 - 10 of 48 items





The Payment Amount window will pop up, allowing you to see a summarized view of your payment along with the total payment amount.

Click the **Submit Payment** button to begin the payment process.

Welcome to the Progress Software Secure Payment Page

Welcome to the Progress Software Demo Secure Payment Page

Transaction Amount: \$7,725.30

We accept:    

Address: *

Address 2:

City: *

State: *

ZIP Code: *


Country: ▼

Email Address: *

Payment Information

Credit Card Number: *


Expiration Date: *

CSC: * 

I agree with [Progress Software Demo Terms & Conditions](#). *

(please click only once to prevent duplicate orders)

<https://www.progress.com> | bsriniva@progress.com | [Progress Software Demo Terms](#) | Copyright 2004-2015 PayTrace, Inc. All Rights Reserved.

 **This is a secure connection.**
All data sent between your computer (98.217.25.11) and PayTrace (<https://PayTrace.com>) is encrypted with a 128 bit Secure Socket Layer (SSL) certificate issued by Comodo Class 3 Security Services CA.

Enter payment information, agree to the Progress Software Terms & Conditions, and click Process Transaction to complete payment.

Renew Maintenance

The Renew Maintenance page is designed to provide an interactive view of your active Maintenance Renewal quote lines and provide an easy method to submit your response. Below are some of the features that make finding and managing your Maintenance Renewal lines fast and simple.

The maintenance contracts on the following licenses are ready to be renewed. Please select the desired renewal action on each line and click Submit to submit your changes.

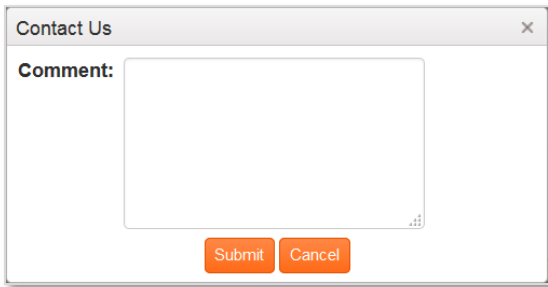
Note : Progress Software is currently transitioning to a new quoting system so some maintenance renewal lines may not be available to renew online at this time. Full transition will be completed by December, 2015.

Serial Number	Product Description	License Type	End User Name	Service Level	Start Date	Contract EndDate	Proposed EndDate	Total Price		Select
3770191	Enterprise Database	PERP		LTDREN	09-Feb-2014	08-Feb-2015	08-Feb-2016	8153.88	<input type="checkbox"/>	Select
4313215	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	2149.20	<input type="checkbox"/>	Select
6036281	OpenEdge Studio	PERP		LTDREN	23-Oct-2014	27-Feb-2015	27-Feb-2016	1105.65	<input type="checkbox"/>	Select
4319745	OE App Server Enterprise	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	1053.00	<input type="checkbox"/>	Select
4318530	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	857.47	<input type="checkbox"/>	Select
4028307	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	415.90	<input type="checkbox"/>	Select
3784151	Enterprise Database	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	236.70	<input type="checkbox"/>	Select
4355631	OE Enterprise RDBMS			LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	563.66	<input type="checkbox"/>	Select
4355097	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	568.37	<input type="checkbox"/>	Select
4161371	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	844.96	<input type="checkbox"/>	Select

Page 1 of 4 10 items per page 1 - 10 of 40 items

Contact Us

Click the **Contact Us** button if you wish to send the Progress Maintenance Renewals team a comment or request.



Simply add your comment and click the **Submit** button. Your comment will be sent to the Maintenance Renewal Team for action.

Maintenance Renewal Grid

The Maintenance Renewal Grid provides an Interactive view of your Renewal Quote Lines. You can select an action on individual or multiple lines and submit them back to the Renewals team for action.

The screenshot shows a table with the following columns: Serial Number, Product Description, License Type, End User Name, Service Level, Start Date, Contract EndDate, Proposed EndDate, Total Price, and a Select column. The table contains 10 rows of data. Callouts point to various features: 'Column Label' points to the 'End User Name' header; 'Column Filter Icon' points to a downward arrow in the 'Product Description' header; 'Download Grid Contents' points to 'Download As PDF' and 'Download As Excel' buttons; 'Select All Lines' points to a 'Select' dropdown in the header; 'All Select Action' points to a 'Select' dropdown in the first data row; 'Select Individual Line' points to a 'Select' dropdown in the second data row; 'Individual Line Action' points to a 'Select' dropdown in the third data row; 'Page Selector' points to the 'Page 1 of 4' indicator; 'Record Display' points to the '10 items per page' dropdown; and 'Record Count' points to the '1 - 10 of 40 items' indicator.

Serial Number	Product Description	License Type	End User Name	Service Level	Start Date	Contract EndDate	Proposed EndDate	Total Price	Select
3770191	Enterprise Database			LTDREN	09-Feb-2014	08-Feb-2015	08-Feb-2016	1,053.00	Select
4313215	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	2,149.20	Select
6036281	OpenEdge Studio	PERP		LTDREN	23-Oct-2014	27-Feb-2015	27-Feb-2016	1,105.65	Select
4319745	OE App Server Enterprise	PERP		LTDREN	01-Mar-2014			1,053.00	Select
4318530	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	857.47	Select
4026307	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	1,053.00	Select
3784151	Enterprise Database	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	1,053.00	Select
4355631	OE Enterprise RDBMS			LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	563.66	Select
4355097	OE Enterprise RDBMS			LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	568.37	Select
4161371	OE Enterprise RDBMS	PERP		LTDREN	01-Mar-2014	28-Feb-2015	29-Feb-2016	1,053.00	Select

Sorting

Sort the grid results by simply clicking the Column Label on the column you wish to use for sorting. Click once to sort ascending. Click again to sort descending. Click a third time to remove the sorting on the column.

Filtering

Click on a column's Filter Icon to display advanced filtering options.

Page Selection

Use the arrows to scroll between pages or enter a specific page number to jump directly to a page.

Record Display

Use the record display selector to increase the number of rows to include on each page.

Download Grid Contents

Use the Download buttons at the top of the grid to download the Grid Contents to an Excel or PDF file. Use the Search Criteria or the column level filtering to control exactly which records will be exported.

Select All Lines

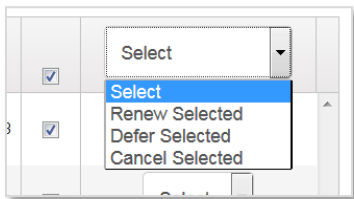
Use the "Select All Lines" checkbox if you wish to apply the same action to all lines. Note that the selection will include all maintenance renewal lines that are in the grid, even if they are on pages that are not currently displayed.

Select Individual Line

Use the "Individual Line Selection" checkbox if you wish to select one or more of lines and apply an action to just those lines.

All Selected Action

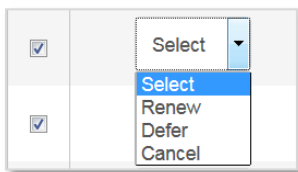
Use the "All Selected Action" selector if you wish to assign the same action to more than one line.



The action that you select will be applied to every line where the checkbox is checked or, if the Select all checkbox is checked, it will be applied to all lines.

Individual Line Action

Use the "Individual Line Action" selector if you want to apply an action only to an individual line.



Note that it is not necessary to have the line selector checkbox checked in order to apply an action.


Quote Line Action Definitions

Renew – Select Renew if you wish to accept the quote line and renew your annual maintenance contract.

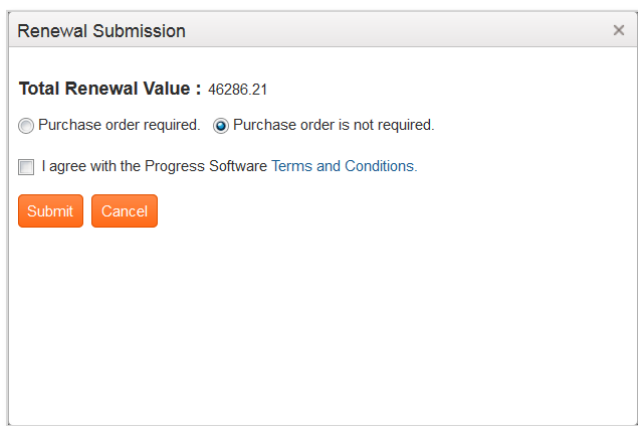
Defer – Select Defer if you are not prepared to make a decision at this time.

Cancel – Select Cancel if you wish to cancel your annual maintenance contract.

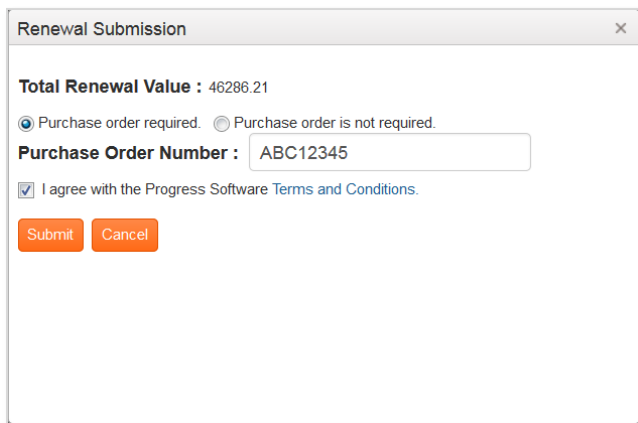
Maintenance Renewal Submittal


To submit your quote response to the Progress Maintenance Renewals team, ensure that you have applied the correct action to each line and then click the  button.

A popup summary window will appear that will allow you to review your renewal total.



If you will be submitting a Purchase Order for your Renewal Order, change the selection to Purchase Order Required and enter your PO Number.



Click the checkbox that you agree with the Progress Software Terms and Conditions and click  to process your action.

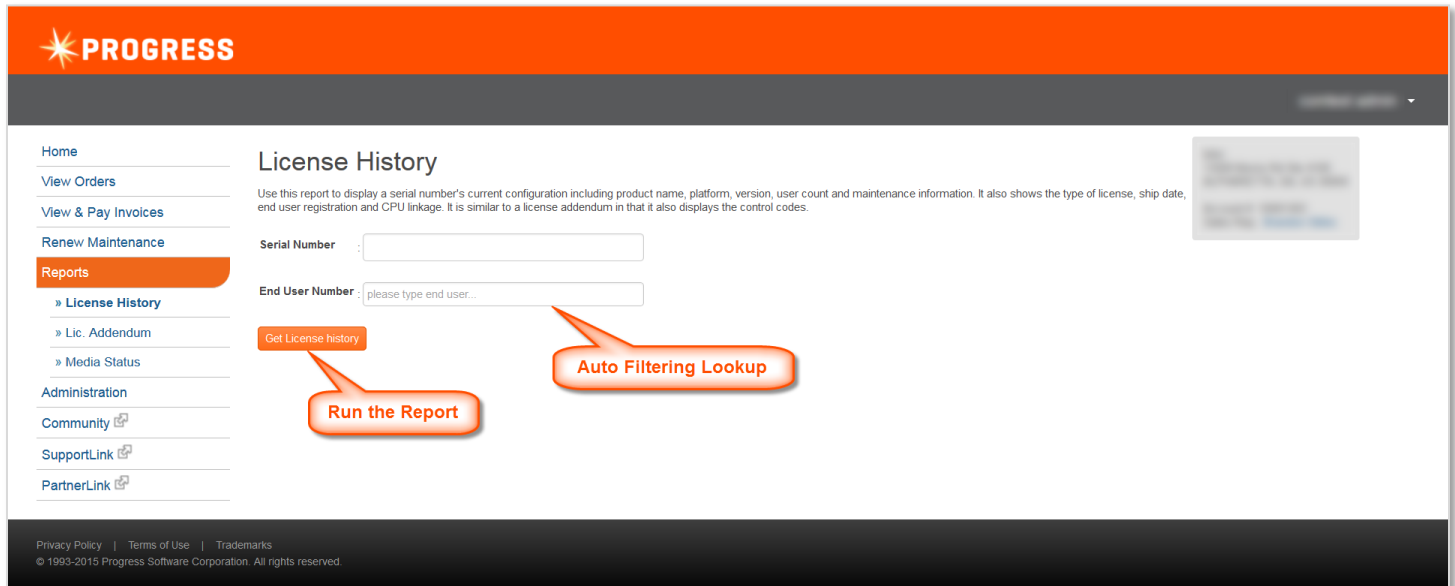
Note: If a PO Number is required, please email your signed Purchase Order to renewals@progress.com. Your renewal order will not be completed until the official PO has been received by Progress Software.

License History Report

Use this report to display a serial number's configuration including product name, platform, version, unit count and maintenance information.

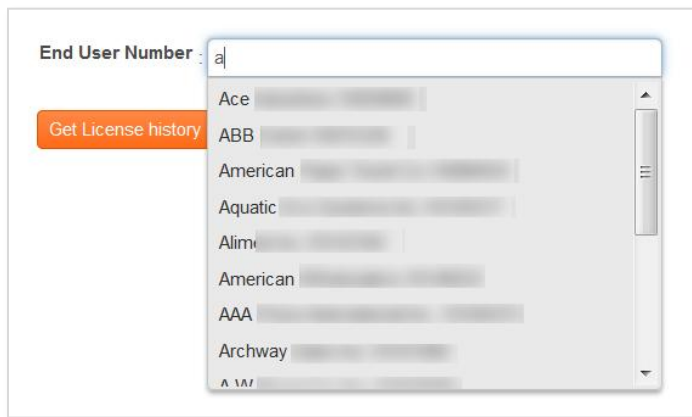
You can run the report for a single serial number or, if left blank, for all serial numbers that are linked to an End User account. You must enter a Serial Number OR an End User.

When run for a single serial, the report will display the history of the license over time, including related serial numbers.

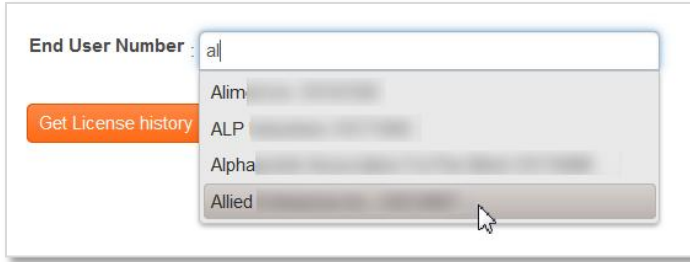


Auto Filtering Lookup

The Auto Filtering Lookup feature for End User allows you to quickly find the End User you are looking for by simply starting to type in their name.



As you type additional letters, the list will continue to be filtered. When you see the End User you are looking for, simply click on it.

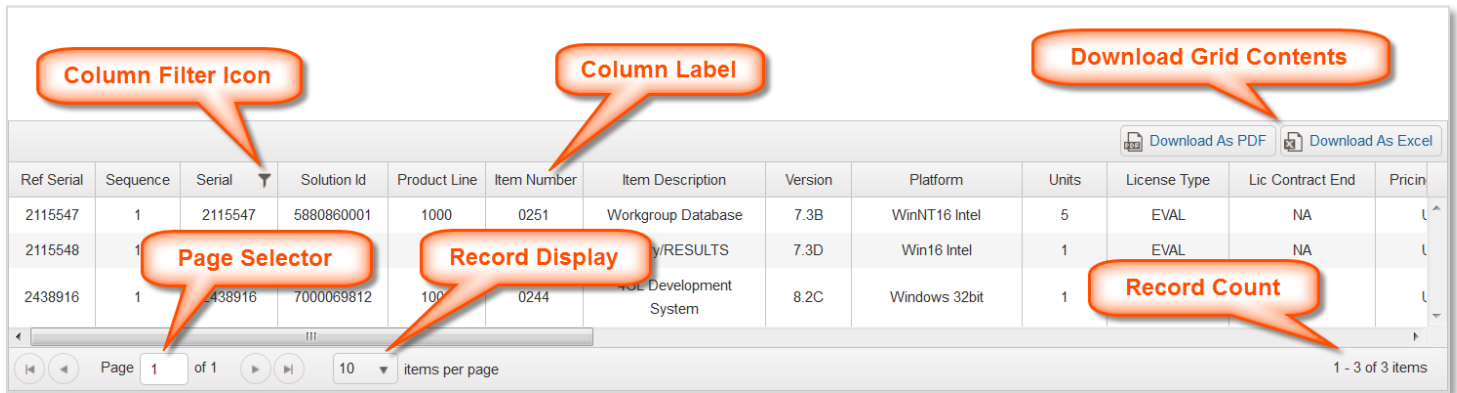


Run the Report

Click the **Get License history** button to run the report. A results grid containing the license history data will appear.

Note that there can be a delay between the presentation of the results grid and the population of the actual data. The time needed to run the report depends on the report parameters and the number of serial numbers that will be included in the output. Running it for all Serial Numbers linked to an End User can take over 1 minute to complete.

License History Results Grid



Ref Serial	Sequence	Serial	Solution Id	Product Line	Item Number	Item Description	Version	Platform	Units	License Type	Lic Contract End	Pricing
2115547	1	2115547	5880860001	1000	0251	Workgroup Database	7.3B	WinNT16 Intel	5	EVAL	NA	
2115548	1	2115548	5880860001	1000	0251	Workgroup Database	7.3D	Win16 Intel	1	EVAL	NA	
2438916	1	2438916	7000069812	1000	0244	SQL Development System	8.2C	Windows 32bit	1			

Sorting

Sort the grid results by simply clicking the Column Label on the column you wish to use for sorting. Click once to sort ascending. Click again to sort descending. Click a third time to remove the sorting on the column.

Filtering

Click on a column’s Filter Icon to display advanced filtering options.

Page Selection

Use the arrows to scroll between pages or enter a specific page number to jump directly to a page.

Record Display

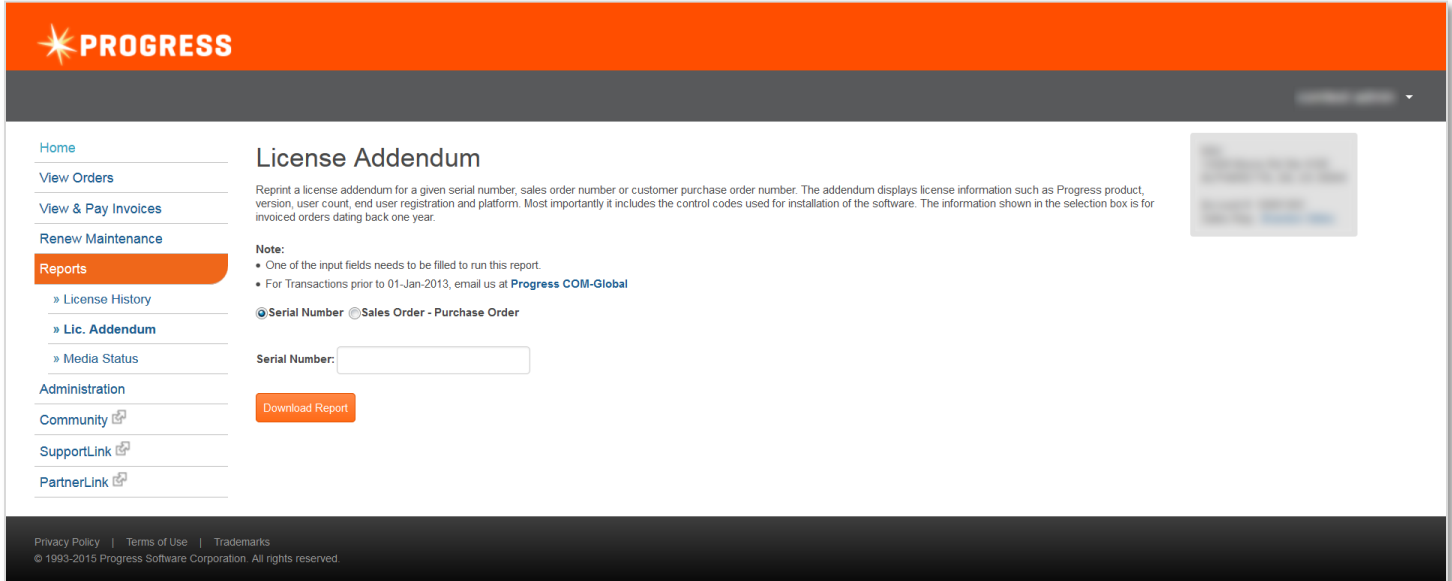
Use the record display selector to increase the number of rows to include on each page.

Download Grid Contents

Use the Download buttons at the top of the grid to download the Grid Contents to an Excel or PDF file. Use the Search Criteria or the column level filtering to control exactly which records will be exported.

License Addendum Print

Use the License Addendum page to reprint one of your license addendums. You need to know either the serial number of the license or the Sales Order / Purchase Order number used when the license was purchased or upgraded.

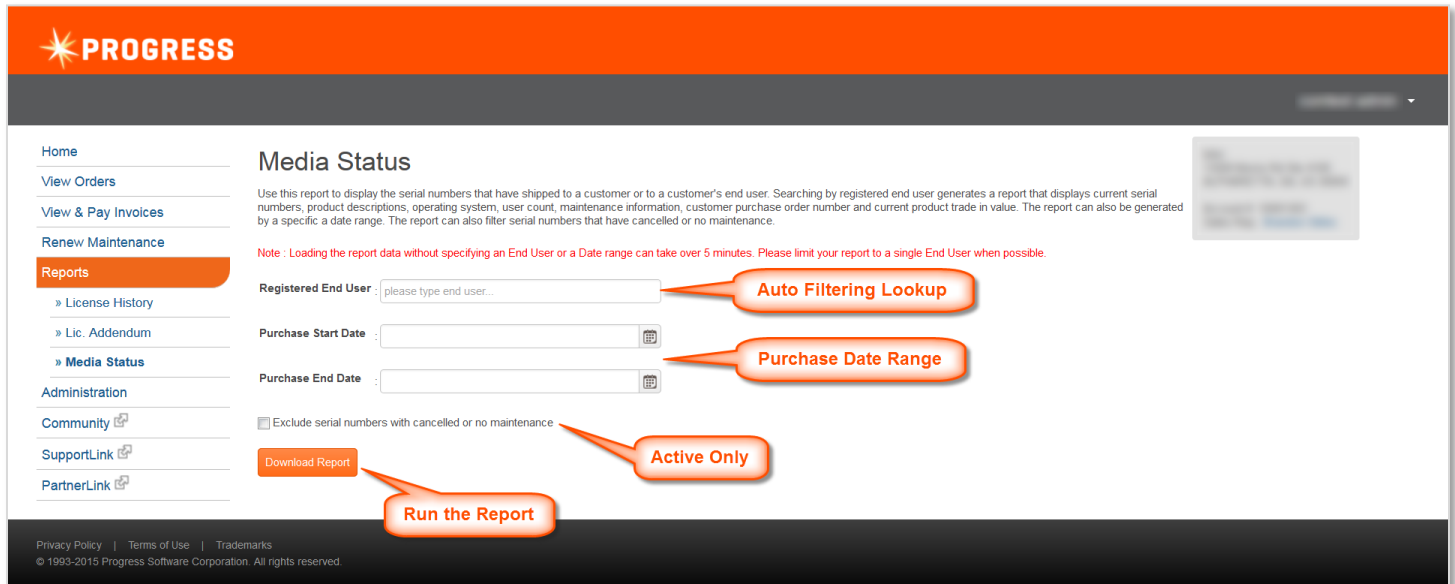


The screenshot shows the 'License Addendum' page in the Progress Customer Self Service portal. The page has a dark orange header with the Progress logo. A left sidebar contains navigation links: Home, View Orders, View & Pay Invoices, Renew Maintenance, Reports (highlighted), Administration, Community, SupportLink, and PartnerLink. The 'Reports' section is expanded to show 'License History', 'Lic. Addendum', and 'Media Status'. The main content area is titled 'License Addendum' and includes a description: 'Reprint a license addendum for a given serial number, sales order number or customer purchase order number. The addendum displays license information such as Progress product, version, user count, end user registration and platform. Most importantly it includes the control codes used for installation of the software. The information shown in the selection box is for invoiced orders dating back one year.' Below this is a 'Note' section with two bullet points: 'One of the input fields needs to be filled to run this report.' and 'For Transactions prior to 01-Jan-2013, email us at Progress COM-Global'. There are two radio buttons for selection: 'Serial Number' (selected) and 'Sales Order - Purchase Order'. A text input field labeled 'Serial Number:' is provided. A 'Download Report' button is located below the input field. The footer contains links for Privacy Policy, Terms of Use, and Trademarks, along with the copyright notice: '© 1993-2015 Progress Software Corporation. All rights reserved.'

The License Addendum will be downloaded in .prn format and can be viewed in a browser or a text editor. For OpenEdge products, the addendum file that is downloaded can be used with the Auto-Installation tool.

Media Status Report

Use this report to display all the current details of your licenses.

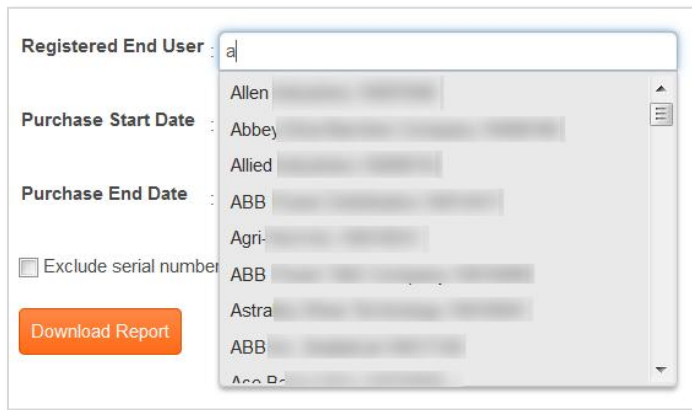


Registered End User (Optional)

It is possible to run the report for all End Users simply by leaving this field blank, however the report can take a long time to run in this mode so it is highly recommended to restrict the report to a single End User.

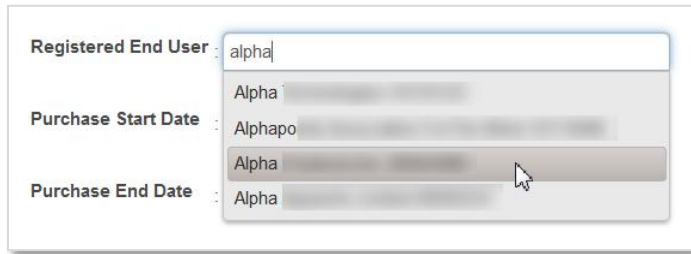
Auto Filtering Lookup

The Auto Filtering Lookup feature for End User allows you to quickly find the End User you are looking for by simply starting to type in their name.



As you type additional letters, the list will continue to be filtered. When you see the End User

you are looking for, simply click on it.



Purchase Date Range (Optional)


Enter the Serial Number Purchase Start and End Dates if you wish to restrict the search routine to licenses purchased during a specific period of time.

1. To search for all licenses without any restriction, simply leave both dates blank.
2. To search for all licenses purchased after a specific date, enter the Start Date but leave the End Date blank.

Active Only

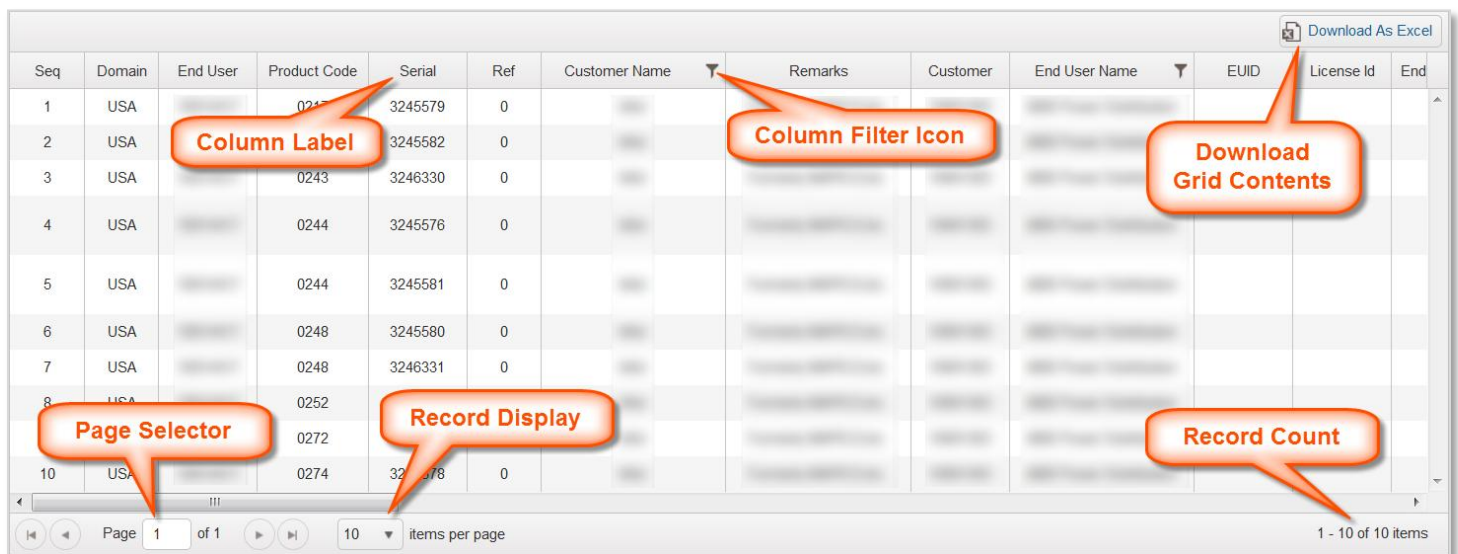
To view only serial numbers with Active maintenance, click the checkbox “Exclude serial numbers with canceled or no maintenance”.

Run the Report

Click the  button to run the report. A results grid containing the media status data will appear.

Note: Loading the report data without specifying an End User or a Date range can take over 5 minutes. Please limit your report to a single End User when possible.

Media Status Grid



Seq	Domain	End User	Product Code	Serial	Ref	Customer Name	Remarks	Customer	End User Name	EUID	License Id	End
1	USA		0243	3245579	0							
2	USA		0243	3245582	0							
3	USA		0243	3246330	0							
4	USA		0244	3245576	0							
5	USA		0244	3245581	0							
6	USA		0248	3245580	0							
7	USA		0248	3246331	0							
8	USA		0252									
			0272									
10	USA		0274	3245578	0							

Page 1 of 1 | 10 items per page | 1 - 10 of 10 items

Sorting

Sort the grid results by simply clicking the Column Label on the column you wish to use for sorting. Click once to sort ascending. Click again to sort descending. Click a third time to remove the sorting on the column.

Filtering

Click on a column's Filter Icon to display advanced filtering options.

Page Selection

Use the arrows to scroll between pages or enter a specific page number to jump directly to a page.

Record Display

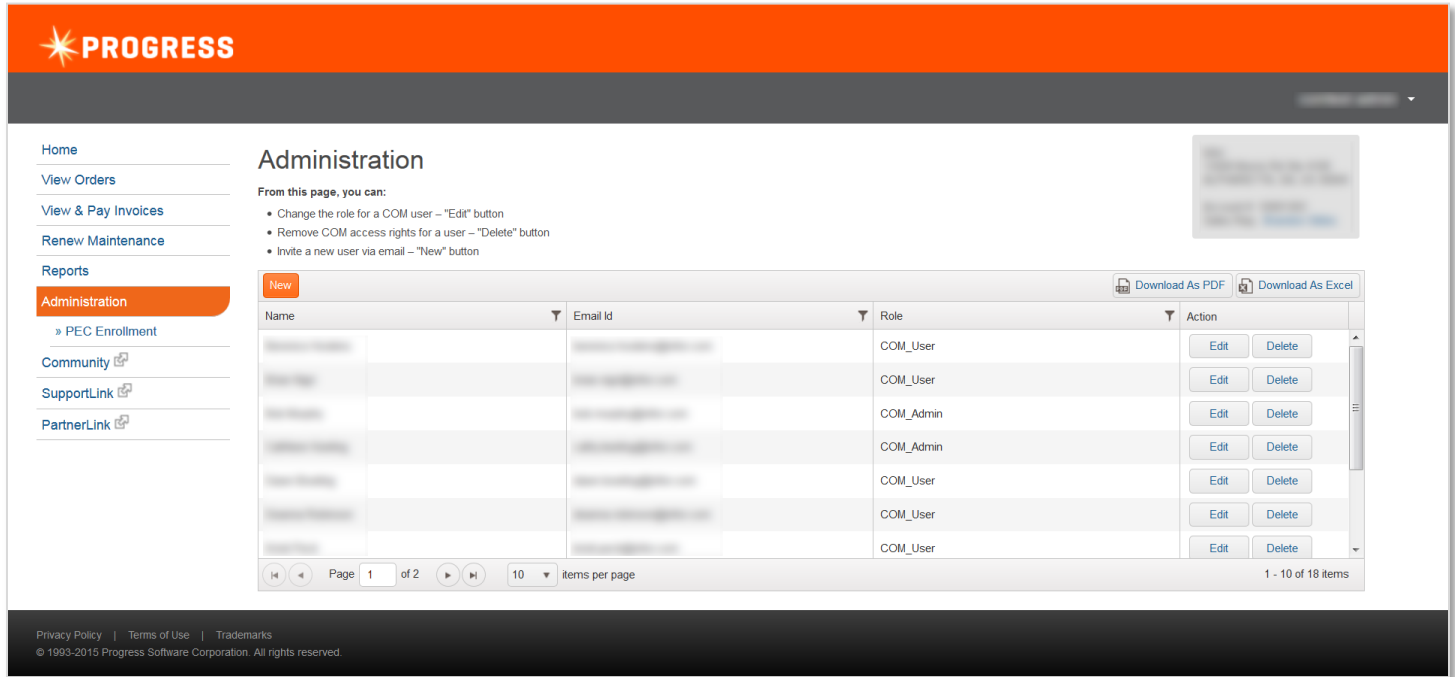
Use the record display selector to increase the number of rows to include on each page.

Download Grid Contents

Use the Download to Excel button at the top of the grid to download the Grid Contents to an Excel file. Use the Search Criteria or the column level filtering to control exactly which records will be exported.

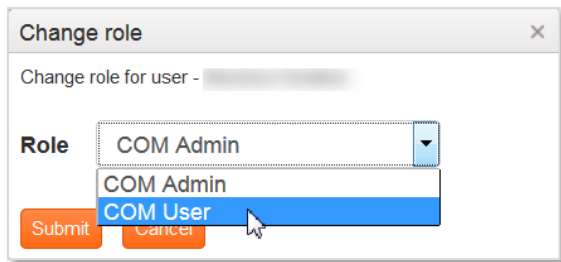
Administration


If you are designated as a Site Administrator for your organization, you will have access to the Administration menu option. Use this page to Delete or Edit existing users and to invite new users to the site.



Edit a Member

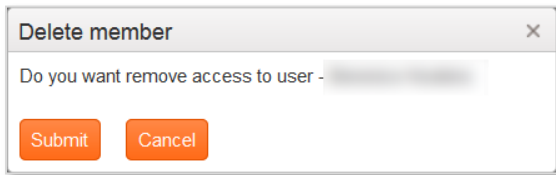
Click the  button if you want to change the role of a member in your organization.



Select the desired role for the member and click  to apply your change.

Delete a Member

Click the **Delete** button if you want to delete a member's access to your account information.

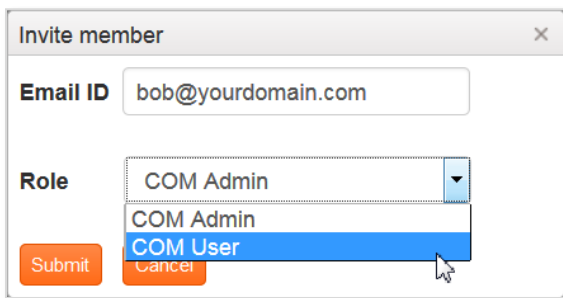


A dialog box titled "Delete member" with a close button (X) in the top right corner. The text inside reads "Do you want remove access to user - [redacted]". At the bottom, there are two buttons: "Submit" and "Cancel".

Click **Submit** to apply your change.

Add a Member

Click the **New** button if you want to allow a new user to access your account information. Simply add the user's email address and specify their role. An email will be sent to them, which will step them through the process of setting up a Progress ID.



A dialog box titled "Invite member" with a close button (X) in the top right corner. It contains an "Email ID" field with the text "bob@yourdomain.com". Below it is a "Role" dropdown menu with "COM Admin" selected. The dropdown is open, showing "COM Admin" and "COM User" as options, with "COM User" highlighted in blue. At the bottom, there are "Submit" and "Cancel" buttons.

Click **Submit** to send the invitation to the new member.

Progress eLearning Community (PEC)

External Administration

A PSDN license provides many benefits, including free enrollments to the Progress eLearning Community (PEC). Each PSDN customer appoints one or more PSDN Administrators within their organization. Using the Customer Self Service Web Application, the PSDN Administrator can submit various requests directly to Progress’ internal PEC Administrator.

This application is designed to submit requests including:

- Add a new PEC enrollment
- Delete a PEC enrollment
- Renew a PEC enrollment

This document outlines the administration processes that the PSDN Delegated Administrator completes to submit various requests to the PEC Administrator at Progress using the application.

Submitting Requests for PEC Enrollments

Once logged in with their Progress ID and password, the delegated administrator is redirected to Progress eLearning Community (PEC) Enrollments page.

Progress eLearning Community (PEC) Enrollments

Additional PEC Enrollments that can be requested : 9

Add Participant (New button)

Available Seats (9 seats)

Progress Id	First Name	Last Name	Email	Status	Action
ID1	Name 1	LastName1	email@test.com	Active	Delete
ID2	Name 2	LastName2	email2@test.com	Expired	Renew Delete
ID3	Name3	LastName3	email3@test.com	Rejected	Delete

Participant Status (Status column)

Actions (Action column)

Page 1 of 1 | 10 items per page | 1 - 3 of 3 items

Note: As soon as a new request is submitted, the user information will be displayed.

Participant Status

- Active: User is enrolled into PEC as an active user
- Delete: Deleting an account request was submitted to the PEC Administrator for processing. Once processed, the deleted account will be removed from the above table.

- Expired: PEC enrollment is expired, and need to submit a request for renewal
- Pending: The PEC Administrator has started to review the enrollment request
- Rejected: Request was rejected. If you have any questions, please contact us

Add Participant

1. Make sure each person you would like to add to the PEC enrollment has a Progress ID & Email address.

Note: If a user doesn't have a Progress ID, please encourage them to do so at:

<https://secure.progress.com/profile/opn/registerUid>

2. Click the orange "New" button, and submit the email address of the user you want to add. You will see the user is added to the list.
3. Your request was submitted to the PEC Administrator at Progress Software to verify.

Actions

The action buttons will change depending on the status. Click the button you that corresponds with the action you wish to request.

Renewal Request

1. If an individual's PEC license expires while the PSDN license is still valid, a "Renew" link will appear under Action. To submit a renewal request, simply click "Renew".
2. Your request was submitted for the PEC Administrator at Progress Software to verify.
3. While your request is being reviewed, the user's status displays as "Pending". Once the request is processed, the status changes to Accepted, Pending or Rejected.

Delete Request

1. Select the user you want to delete, and click "Delete".
2. You are prompted to confirm if the request should be submitted. Click "OK" to proceed.
3. Your request was submitted to the PEC Administrator at Progress Software to verify.
4. Once the request is processed by the PEC Administrator, the user's name and information will be removed from the Current Enrollment Status Table, and the number of the additional enrollments will be increased.