# mySuite User Guide: Table of Contents

**Note:** This User Guide is a shortened version of the mySuite Manual. It is intended to get you through the initial installation and registrations needed for you to begin using mySuite. For more complete details, please refer to the complete version of the mySuite manual, available as a PDF file or online in the mySuite Knowledge Base resource.

# MySuite User Guide

## 1. MySuite User Guide

MySuite is a collection of powerful web based tools. Its resources are designed to speed up your business's internal and external communications, organize intellectual capital, standardize tasks, and improve internal processes. Our applications will boost your organizational performance and increase productivity.

We recommend reading the entire manual, as it contains explanations that make this system easier to use. It has been written in a straight forward, objective style. This manual also includes graphics to help you better understand its contents.


- **Customer Resources:** For registering Customers (business customers) and Users (business customers' employees)
- **Organizational Resources:** Shows the business's principle administrative divisions, HR System, and Internal Messenger for communicating between co-workers.
- **Task Manager:** Manage corporate activities and administer tasks to be carried out during the work day. Tasks may also be grouped into projects.
- **Knowledge Base Manager:** A channel for sharing, disseminating, and distributing corporate information among an organization's members.

- **Online Support:** Allows for innovative, differentiated, and fast real-time contact with customers.
- **Help Desk:** A ticket recording system that manages the flow of messages between your business and external customers.
- **Internal Communicator (Messenger):** An instant messaging / chat application developed to improve real-time communications between employees.
- **Requests:** A internal version of Help Desk used that organizes the flow of messages between co-workers within your business.
- **Discussion Forum:** A chat room where co-workers can interact about projects, pending matters, inquiries, productivity, and other topics.
- **Telephone Support:** System for registering support actions given to external customers via telephone.

# 2. Installation

## 2.1. Installation

MySuite works using our web browser **BraZip Central**. This application is based on **Adobe's AIR platform**, which you may install on as many computers as you want. You must install Adobe AIR so co-workers can fully access and use mySuite's resources that are based on this browser.

Download the latest version of Adobe Air at the following Adobe website link:

http://get.adobe.com/air/

Download the BraZip Central Browser installation file at:

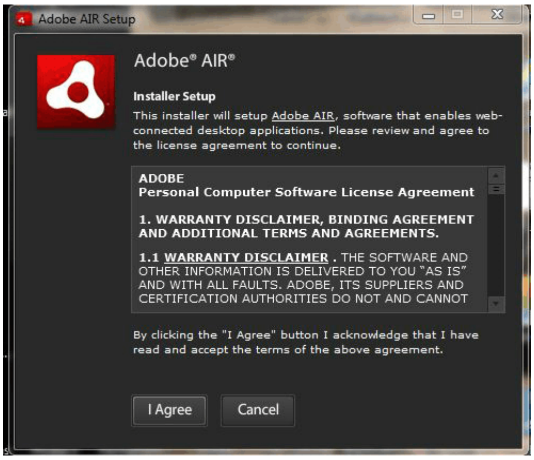
http://www.mysuite.com.br/brazipcentral.php

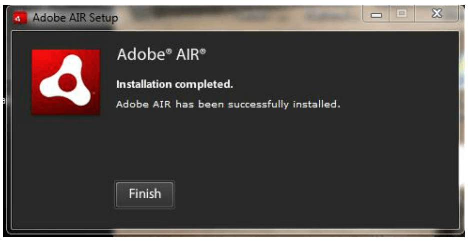
## 2.2. Installing and Setting Up the BraZip Central Browser

### 2.2.1. Installing Adobe AIR:

Download the Adobe AIR installation file at: http://get.adobe.com/air
- Click the “DOWNLOAD NOW” button.
- Click the  “I Agree” button to validate Adobe AIR’s license agreement.
- Click the “Finish” button to finalize installation.

*This installation will be downloaded directly from Adobe, automatically selecting your operating system.



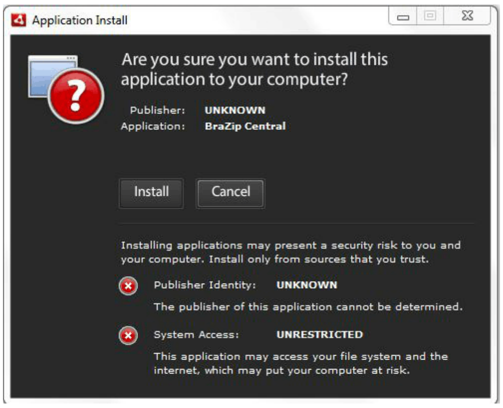

1) Initial installation screen:
Click the “I agree” button to continue.

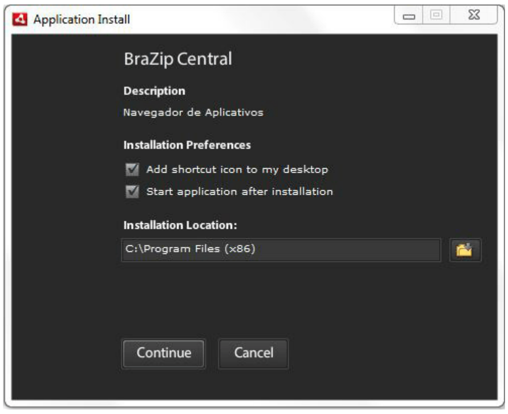
2) Final installation screen:
After completing installation, click “Finish”.

### 2.2.2. Installing BraZip Central:

- Install mySuite’s browser BraZip Central AFTER installing ADOBE AIR (item 1). Use the following link: http://www.mysuite.com.br/brazipcentral.php

Installing mySuite’s browser is important so your co-workers can access your support area and use all of the system’s functions. This browser is minimized on the toolbar, beside the clock, making use of the system more comfortable and flexible.



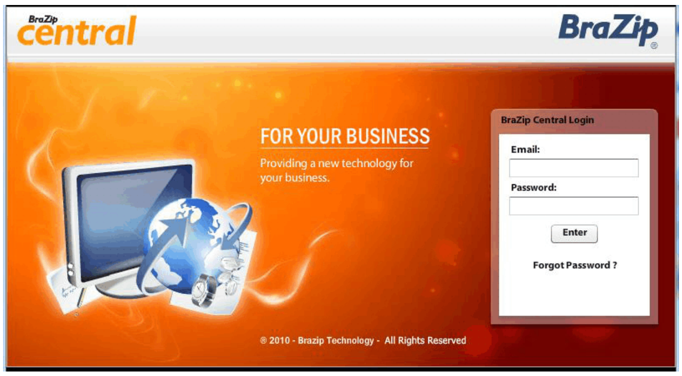

1) Initial installation screen:
Click the "Install" button to continue.

2) Final installation screen:
Check your preferences and click "Continue".

## 2.2.3. CONFIGURATION:

**1) Authenticating your business's BraZip Central (Orange Screen):**

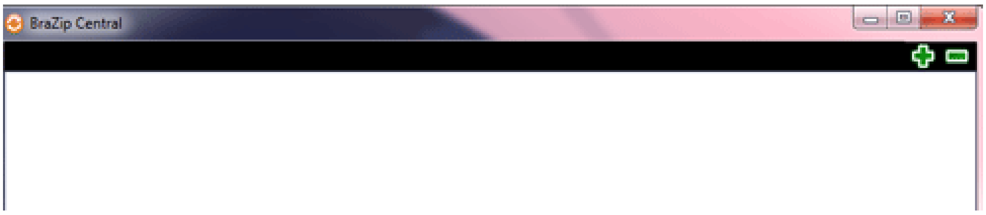
After installing the browser, you will see your business's login screen.
Enter the business login BraZip Technology furnished when you subscribed to mySuite.




"BUSINESS LOGIN" screen (Orange Screen)
Enter the business login BraZip Technology furnished when you subscribed to mySuite

**2) Adding resources (TAB):**

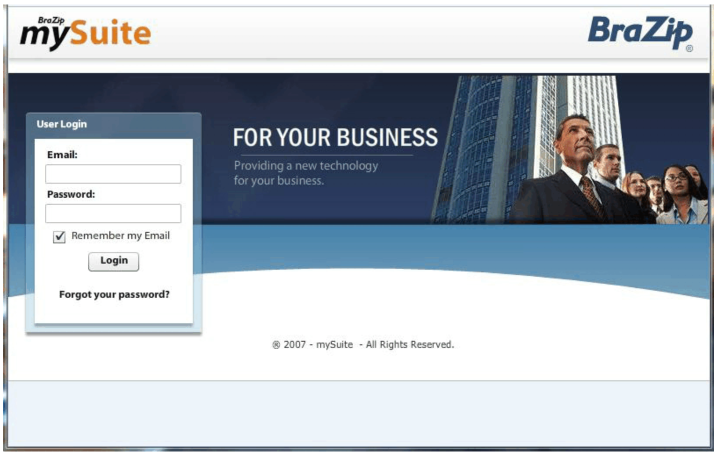
- A white window will appear with two icons on the upper right of the screen,  "**+**"  and "**-**"
- Click the green "+" to add resources (modules).
- In the list of options, click the green "+“ to add BraZip mySuite.
- Give that and any other resource you add a name. Ex. mySuite.  (This name is for internal use. Only operators will see it.)
- Wait while the application downloads (see progress bar).




Add mySuite Resource Tab Screen

**3) Co-worker login (Blue screen):**

- The co-worker (user) screen will be shown. Enter your login information.



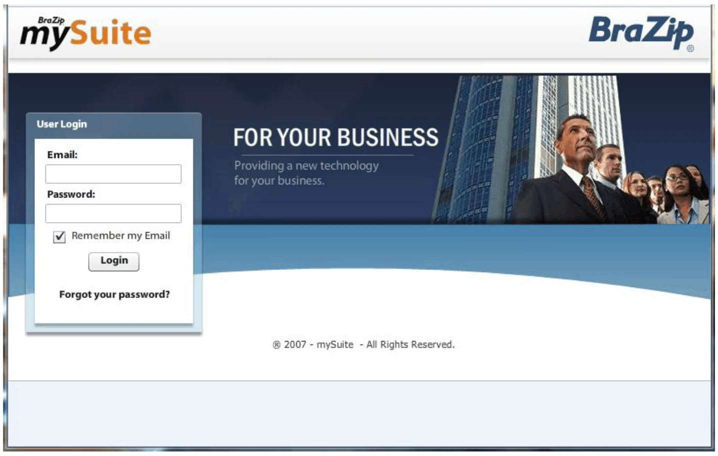

“CO-WORKER LOGIN” Screen (Blue Screen)
This process authenticates an employee's data when he or she logs in.

## 2.3. Accessing mySuite:

To access mySuite the first time, BraZip will provide an Administrator profile. The Administrator will have total access to the system.

Once the Administrator accesses the system, the Administration button, located on the Main toolbar, will be active.

The Administrator is responsible for all initial mySuite registrations, which will be described throughout this manual.




“CO-WORKER LOGIN” Screen (Blue Screen)

## 2.4. IP and Communications Port Configuration:

If your business uses a Proxy or Firewall, you will need to enable access to the following:

- ✓ Enable full access to the domain *. mysuite.com.br
- ✓ Enable full access to the domain *. mysuite.com.b1r
- ✓ Enable full access to the domain *.mysuite2.com.br
- ✓ Enable full access to the domain *.brazip.com.br
- ✓ Enable full access to the domain *.brazipcentral.com.br
- ✓ Enable full access to the domain download.mysuite.com.br
- ✓ Enable full access to the domain http://*.s3.amazonaws.com/*
- ✓ Enable port TCP 2038 for the following domains: fms03.mysuite.com.br , fms04.mysuite.com.br, and fms05.mysuite.com.br (Messenger and Online Chat systems).

# 3. Access Link

## Co-worker's Access Link:

You can access our system from anywhere.

You do not have to be at your business to use mySuite’s resources.

You also do not have to use mySuite’s browser to access the system. You may do so using a traditional internet browser (Internet Explorer, Firefox, etc.).

The standard link is:

**http://yourbusiness.mysuiteX.com.br**

Note:

Substitute "**yourbusiness**” with the name furnished by BraZip’s Technical Support team.

Substitute “**X**” with the number furnished by BraZip’s Technical Support team.

# 4. Structure and Basic Concepts

## 4.1. Main Structure

In the main structure, co-workers have a personal **Profile** containing personal data and photos (optional). All co-workers use their own profile to access the system, work, and keep in touch with the entire team.

To make directing topics and pending matters to the person responsible for each sector easier, co-workers are grouped into **Internal Departments**. This organizational hierarchy is well defined, reflecting the structure adopted when registering departments in the system.

To eliminate using paper and notes, mySuite offers an **Internal Message Exchange System** for sending internal messages about different topics like telephone calls received, messages from people outside your business, pending matters, and notices about meetings, among others.

The **HR System (Human Resources)** was created to organize information for that sector.

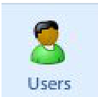
The system includes global registration of Customers and their Users (a business customer's employees) that is integrated into all of its resources. This main structure is included free of charge.

# 4.2. Basic Concepts

You must understand the concepts “Co-worker”, “Customer / Business Customer”, “User”, and “Internal Departments” in order to begin using mySuite. They are:


**1) Co-worker / Operator**: Your business's employees.


**2) Customer / Business Customer**: Every business that is your customer:  Ex.: The company XYZ is your customer.




**3) User**: Your business customer's employees.  Ex.: The Users Paul and Mark work for company XYZ and have access to the customer service your business provides.


**4) Internal Departments**: These are a business's principal administrative divisions.  Ex.: Administrative, Comercial, Financial, and Customer Support.

**5) Alphabetization**: When viewing lists or filtering for co-workers / users by name, the list will be alphabetized by first name rather than by last name. Ex.: John Smith will be listed as "John Smith" rather than as "Smith, John".

# 5. Main Screen (Menu and Toolbars)

## 5.1. Quick Access Menu

**A - Left-Hand Sidebar**

**1) Messenger**: Chat box for exchanging instant messages with co-workers.

**2) Notes:** Shows messages your co-workers have written, allowing you to answer them in the same area.

**3) Discussion Forum**: Chat rooms where you can interact with co-workers about projects, pending issues, inquiries, and productivity, among other things.

**4) Task Manager**: Access tasks that are to be carried out during the work day.

**5) Knowledge Base Manager**: Contains Knowledge Base Tools that are channels for sharing corporate information.

**6) Online Support**: System that permits contact with customers in real time.

**7) Telephone Support**: System that permits contact with customers in real time via telephone.

**8) Help Desk**: System for registering tickets of messages / calls between your business and its external customers.

**9) Requests**: System for registering requests exchanged internally between co-workers.

**B - Right-Hand Sidebar**

**1) Send a Note**: Allow you to send messages (notes) to other co-workers.

**2) Create a Task**: Allows you to quickly create a task.

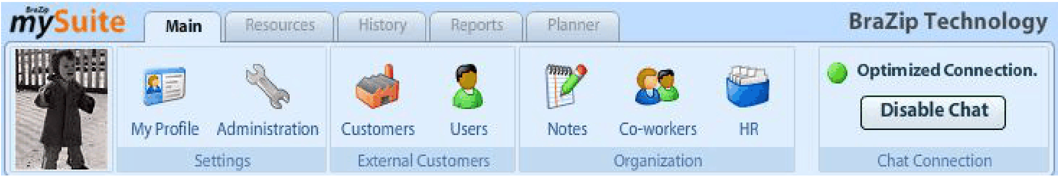
**3) Create a New Telephone Support Interaction**: Allows you to register telephone support actions.

 **4) Create a New Ticket**: Allows you to create support tickets for customers.

 **5) Create a New Request**: Allows you to create an internal request.

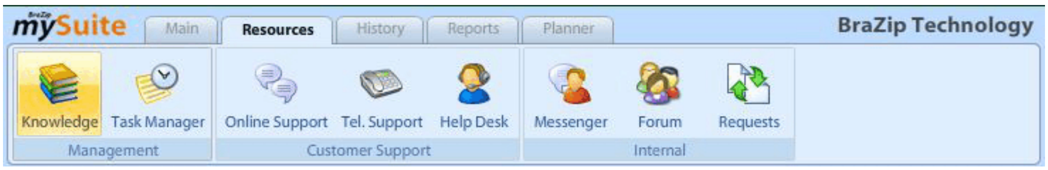
## 5.2. Description of Toolbars:

**1) Main Toolbar:** Accesses a co-worker profile's initial screen.



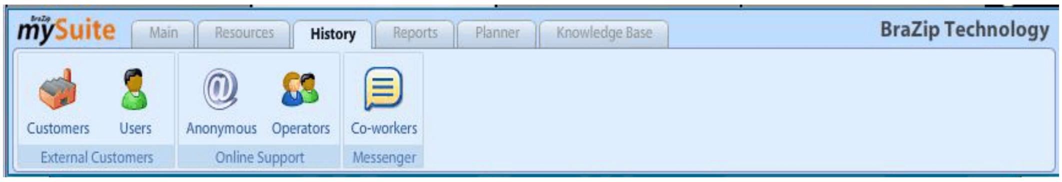

- **My Profile**: Shows your co-worker's settings. All employees can choose background themes, change their photos, enter registration data (name, email, password) and descriptions of their personality
- **Administration**: This button is active if your co-worker is a system administrator.
- **Customers**: Permits registration, editing, and removal of business customers.
- **Users**: Permits registration, editing, and removal of business customers' external users.
- **Co-workers**: Exhibits a business's "Internal Departments" with their respective co-workers.
- **Notes**: Shows messages received and lets you respond to them in that area.
- **HR**: Manages co-workers' records.
- **Internal Communicator / Chat Connection**: Area for connecting to the chat server, needed for the Internal Communicator and Online Support resources.

**2) Resources Toolbar:** Access the system's main resources.



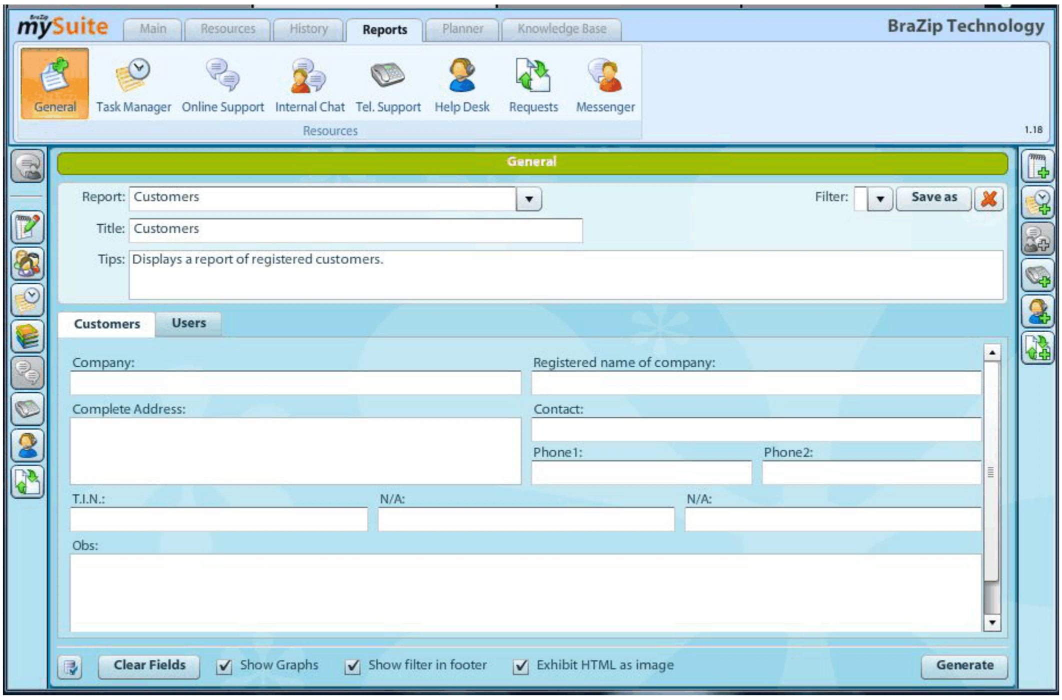

- **Knowledge Base**: Has Knowledge Base Tools for sharing corporate information.
- **Tasks**: Has tasks to be carried out during working hours.
- **Online Support**: Permits contact with clients in real time via chat.
- **Help Desk**: Tickets of messages exchanged between businesses and external clients.
- **Telephone Support**: Register of support actions given to external customers via telephone.
- **Messenger**: Permits contact between co-workers via instant messages.
- **Forum**: Chat room in which co-workers can interact about projects, pending issues, needs and productivity, among other things.
- **Requests**: Registers requests exchanged internally between co-workers.

**3) History Toolbar**: Permits searching for all of the system's histories.




- **Clients**: Lists a Business Customer's history.
- **Users**: Lists the history of a business client's users.
- **Anonymous:** Filters online support given to anonymous users.
- **Operators**: Lists support actions that a specific co-worker has given via Online Support.
- **Co-workers**:  Lists conversations using the internal communicator.

**4)  Report Toolbar**: Area that gives access to reports for all modules.




- **Main**: Listing of clients, external users, co-workers.
- **Task Manager**: Reports of pending tasks, detailing of tasks, quantitatively by company.
- **Online Support**: Analysis of time spent on support, daily statistics, listing of support  actions.
- **Help Desk**: Quantitative detailing of tickets per operator, tickets pending with your  business
- **Requests**: Listing of requests, details of requests.
- **Messenger**: Listing of conversations and quantitative reports.

These are some of the existing reports. All reports have search filters that let your narrow down your search results to more precise information.

# 6. Initial Registration (Required)

## 6.1. Initial Registration (Required)

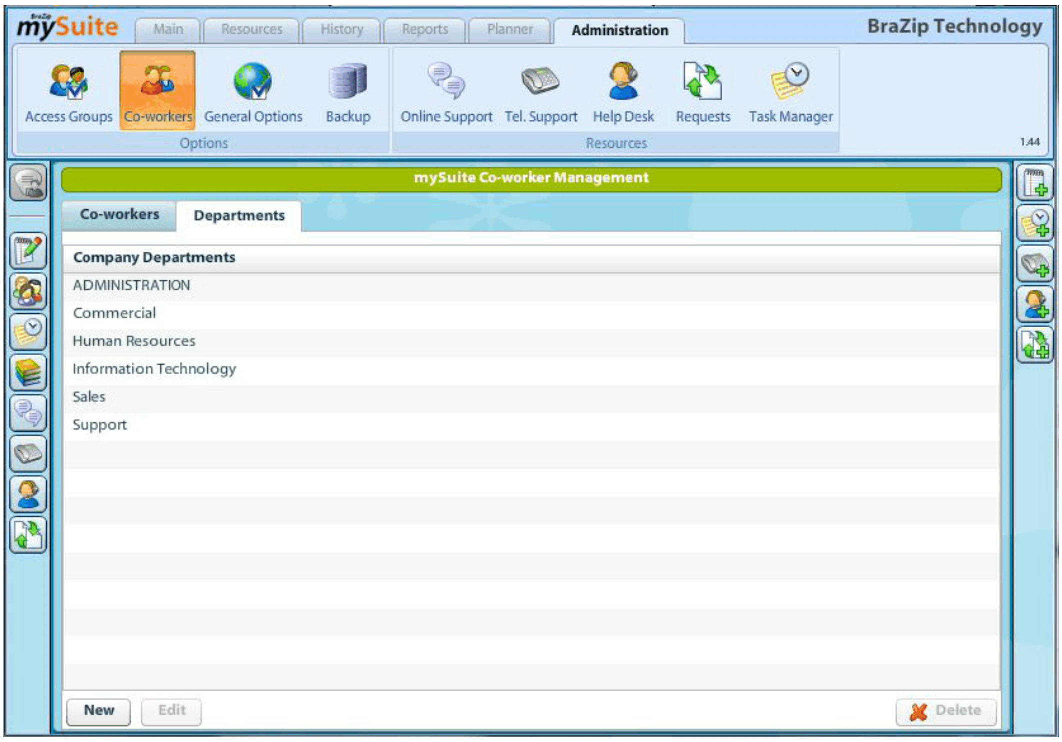
To begin using mySuite, you must register some basic information:

- Departments,
- Co-workers/Operators,
- Access Groups,
- Customers,
- External Users, etc.

To do so, you must access mySuite using an **Administrator's** account having all rights and privileges in the system.

All of these configurations must be made using the **Administration** button located on the “Main” toolbar. (**Main>Administration**).

## 6.1.1. Registering Internal Departments




Register all of your business's administrative divisions as a whole. Ex.: Administrative, Commercial, Financial, and Support.

Steps:
Access the Main toolbar.
- Click the Administration button.
- In the area Options, click the Co-workers button.
- Select the Departments toolbar.
- Immediately click the New button.
- Furnish the name of the department and click "OK".

Repeat this process to create other departments.

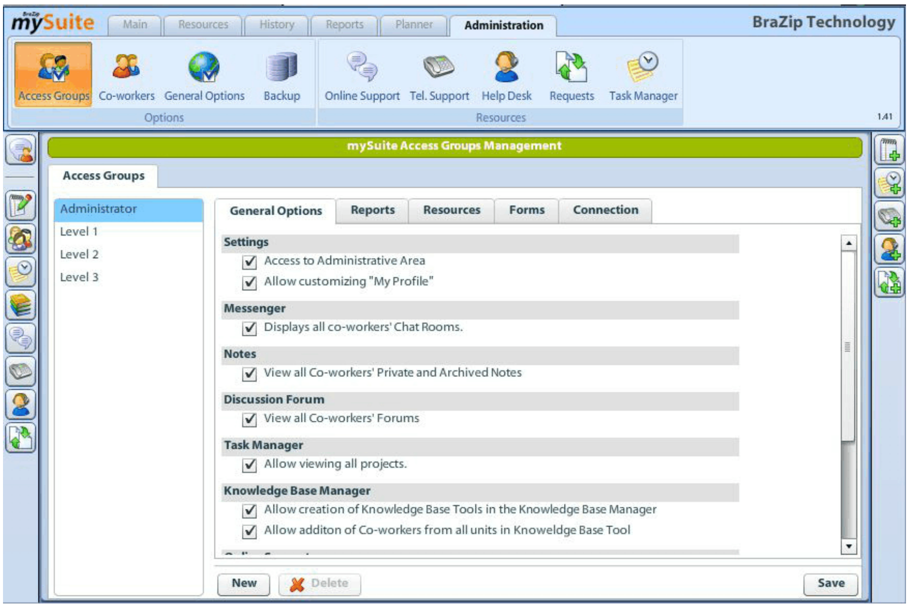
## 6.1.2. Defining Access Groups

You must define **co-workers' access permission** according to the "**Access Group**" to which they belong. You must, however, first configure the groups and then register co-workers

MySuite has the "Administrator" group plus three other levels of access. Those groups can be configured in accordance with your business's security policies. You can exclude and create new groups:

Options for "Access Groups'" toolbars are:

**1) General Options Toolbar:**




- **Access to Administrative Area**: Grants co-workers access to the Administration button on the Main toolbar.

- **View all Co-workers' Private and Archived Messages**: Grants the group the right to view other co-workers' private and archived messages in the "Internal Message Exchange System".

- **View All Co-workers' Forums**: Allows the group to list other co-workers' forums and to follow all in-company topics.

- **Operator can close out Requests opened by another co-worker**: Makes it possible for those in the group to close out any request.

- **View All Co-workers' Online Support History**: Allows those in the group to list other operators' history and to follow all support provided by the company.

- **Permits the Creation of Tools for Managing Knowledge Base**: Authorizes those in the group to create new knowledge base management tools.

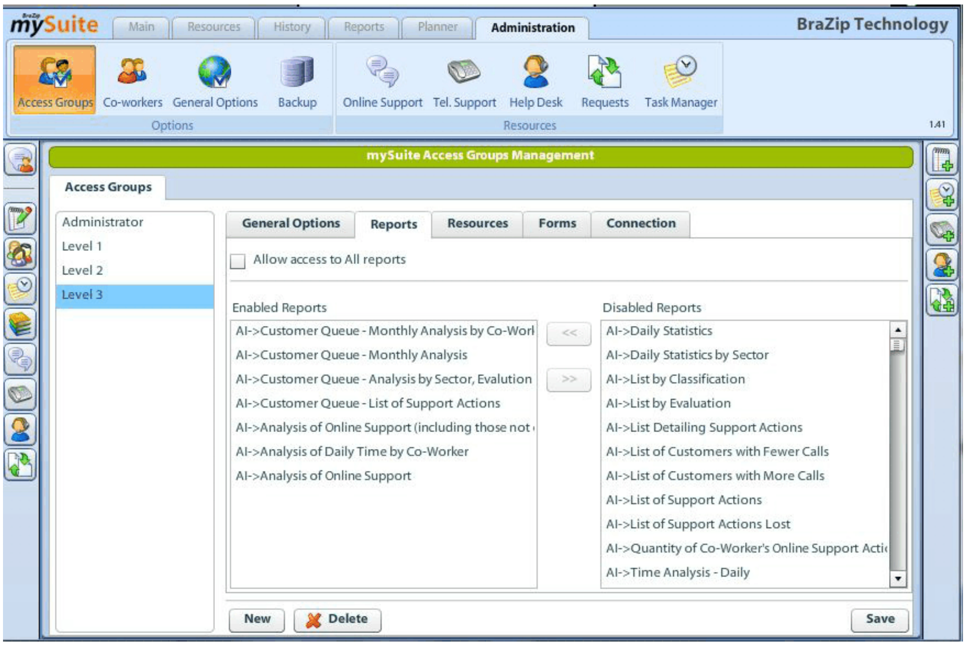
- **Permits Customization of "My Profile"**: Grants co-workers' access to the "My Profile" Option and lets them change their own personal data.

**- Allows Monitoring of Online Support**: Enables the “Monitor” button in the support area so those in the group may follow all conversations between an operator and a customer.

**- Allows Viewing of All Projects**: Activates the “Show All Projects” button in Task’s “Project Manager” area.

Click “Save”. Alterations to co-workers' settings will not be validated until the next time those co-workers log in.

**2) <u>Report Toolbar</u>:**

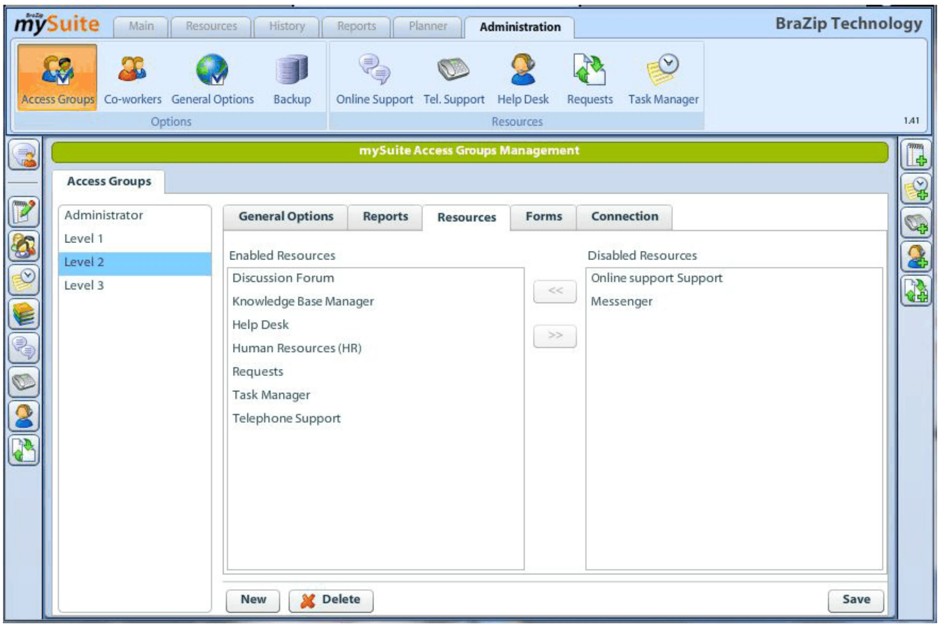



Allows access to all Reports:  Those in the group can generate reports for all resources.

Unless marked, the system default is to block access to all reports. For those in the group to access specific reports, you need only unlock access.  To do so:

- Select the report from the “Reports Not Allowed” list in the box on the right and add it to the “Reports Allowed” on the left by using the "<<" button.
- Click “Save”. Alterations to co-workers' settings will not be validated until the next time those specific co-workers log in.

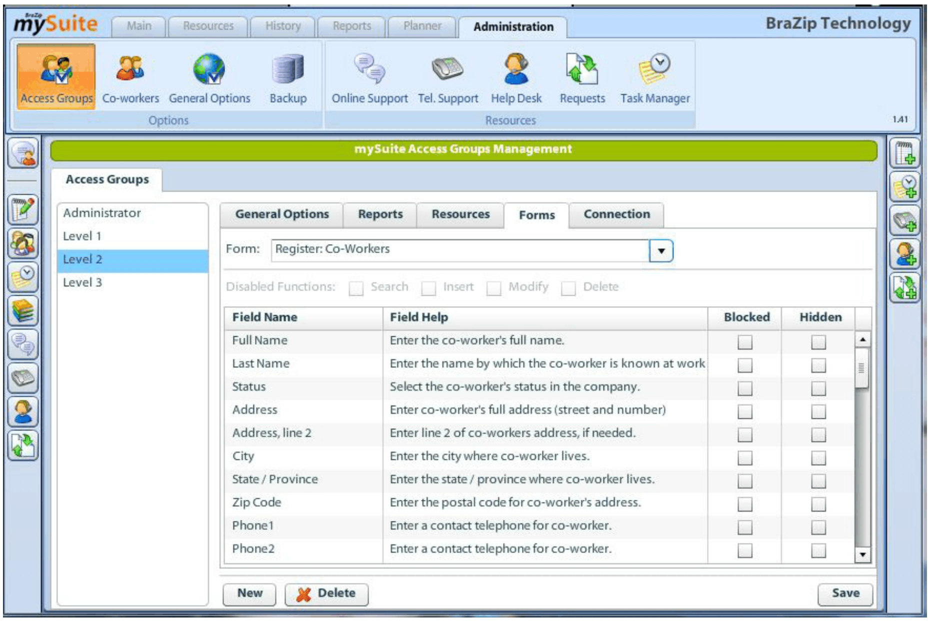
## 3) Resource Toolbar:




By default, the system grants access to all resources. If you do not want those in a group to have access to specific resources, you only need to block access. To do so:

- Select the resource in the "Resources Allowed" on the left and add it to the "Blocked Resources" on the right by using the ">>" button.
- Click "Save". Alterations to co-workers' settings will not be validated until the next time those specific co-workers log in.

## 4) Forms Toolbar:



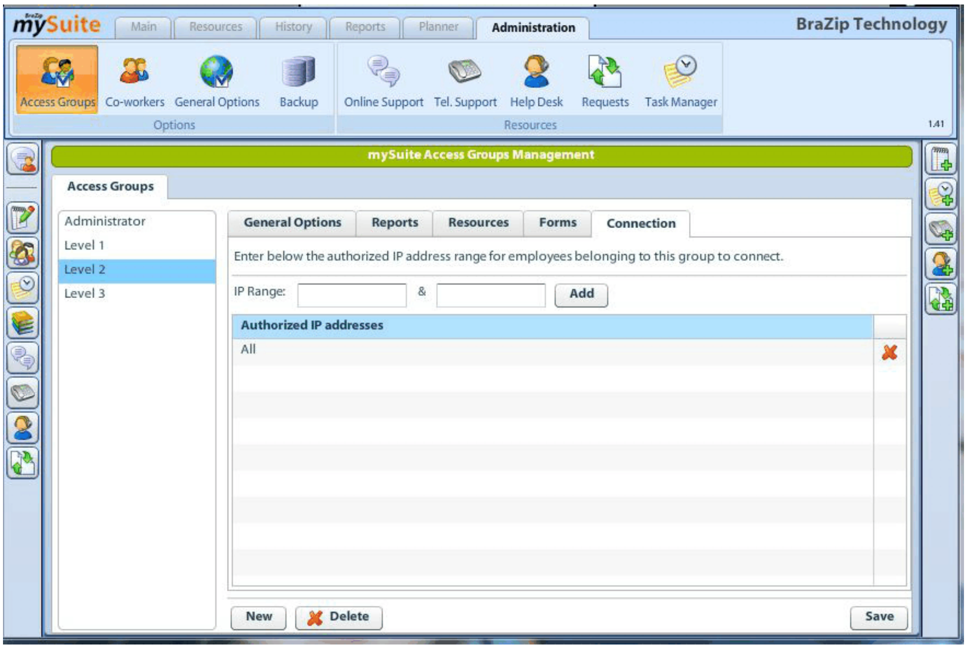
You can define the level of access and operations **per form**. To do so, just select the desired form and configure it accordingly.

**- Blocked Operations**: If marked, co-workers in a group **CANNOT** carry them out (Research, Insert, Alter, or Delete).

For a **form's fields**, you have the following options:
**- Blocked**: Those in the group cannot alter the field's contents.
**- Hidden**: Those in the group cannot view the field on the form.

- Click "Save". Alterations to co-workers' settings will not be validated until the next time those specific co-workers log in.

**5) <u>Connection Toolbar</u>:**

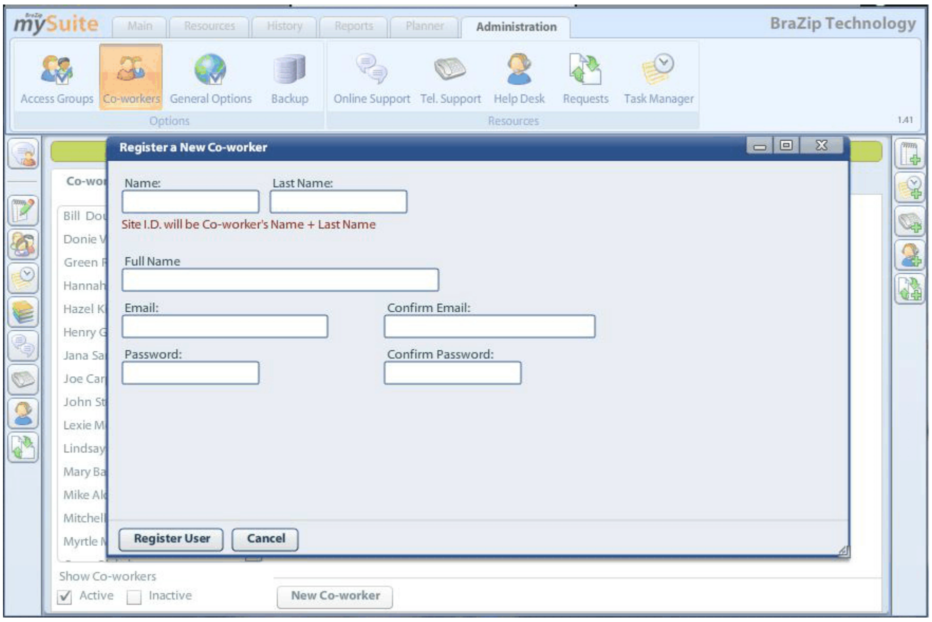



You can limit the IP address range of an "Access Group" when members log in to mySuite. To do so:

- Fill in the IP Range fields
- Click "Add".
- Click "Save". Alterations to co-workers' settings will not be validated until the next time those specific co-workers log in.

## 6.1.3. Registering Co-workers / Operators

Register co-workers who will use mySuite, regardless of the resources to which they will have access. Each will have a personal “Profile” in the system.




- Access the Main Toolbar.
- Click “Administration”.
- In the “Options” area, click “Co-workers”.
- Select the “Co-workers” toolbar.
- Click “New Co-worker”.
- Fill in co-worker’s information.
- **ATTENTION!** Select the “Access Group” to which he or she will belong after registering. (See **Section 6.1.4., Defining Co-workers’ Configurations** below)
- Click “Register User”.

**Hints:**

**1) Never** register co-workers with an **invalid email**. They will receive a message to reset their password via email.

**2)** If co-workers forget their password, they just need to give their email in mySuite’s login area and click “Forgot Password?”. They will then receive a message to reset their password..

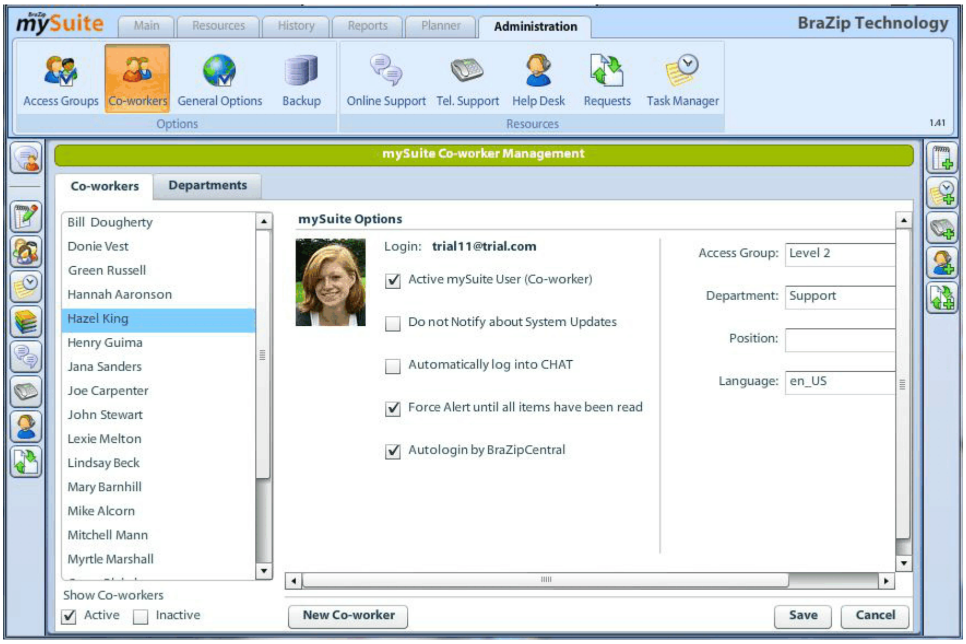
**3) You cannot delete co-workers. You can only deactivate them!** The system retains many threads from “Customer History”, including the co-workers involved. Deleting a co-worker would compromise the “Customer History” data. You will have no way of knowing who spoke with the customer, which is a significant loss of information for your business.

In order to deactivate a co-worker, just unmark the option “**Active Co-worker in mySuite**”. That co-worker will no longer have access to your company’s mySuite

**4)** Remember that the total number of employees using mySuite refers only to those who are active.

## 6.1.4. Defining Co-workers' Configurations:

You can configure the following settings:




- **Login**: Shows the email the co-worker will use to  log in. Co-workers may request to reset their passwords at login. They will receive a message with a link at this email in order to do so.

- **Active mySuite Co-worker**: Enable or disable a co-worker's access to mySuite.

- **Do Not Alert about System Updates**: Enable or disable notifications about changes in the system.

- **Automatic login to Internal Communicator / CHAT**: Mark for a co-worker to be automatically logged into the Internal Communicator immediately upon accessing mySuite.

- **Force Alert until All Items Have Been Read**: By marking this, the alert system will continue blinking until a co-worker has read all Alert items.

- **Access Group**: Select the access group to which a co-worker will belong. Remember that group access permission can be checked in the administrative area using the "Group Access" button.

- **Department**: Choose an internal department that has already been registered.

- **Position**: Describe a co-worker's job.

Click "Save" to record changes made in a co-worker's registry.

**Hints:**

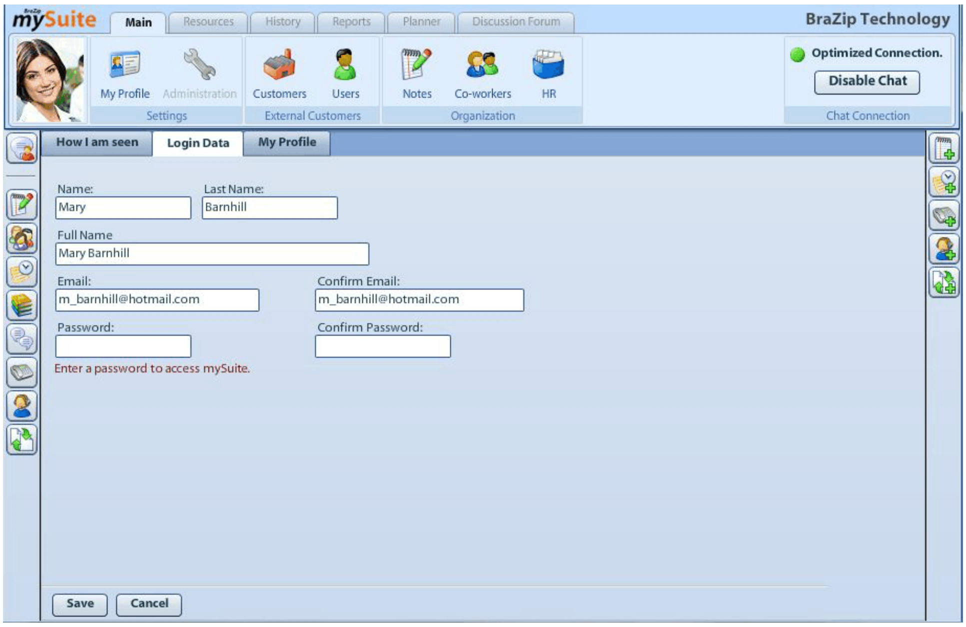
Never leave ACCESS GROUP field blank as it defines co-workers' access permissions in the system.

## 6.1.5. Accessing “My Profile”

Co-workers can modify their background theme, photograph, name, email, password, and information in the “My Profile” area.

To do so:

- Click the Main Toolbar.
- Click “My Profile”.




**1) “How I am Seen” Toolbar**: Shows how your profile will appear to others.
**2) “Login Data” Toolbar**: This is where co-workers can change their name, email, and password.
**3) “My Profile” Toolbar**: Stores data that will be shown to other co-workers. You can also can choose a new “Theme” or change your profile photo.

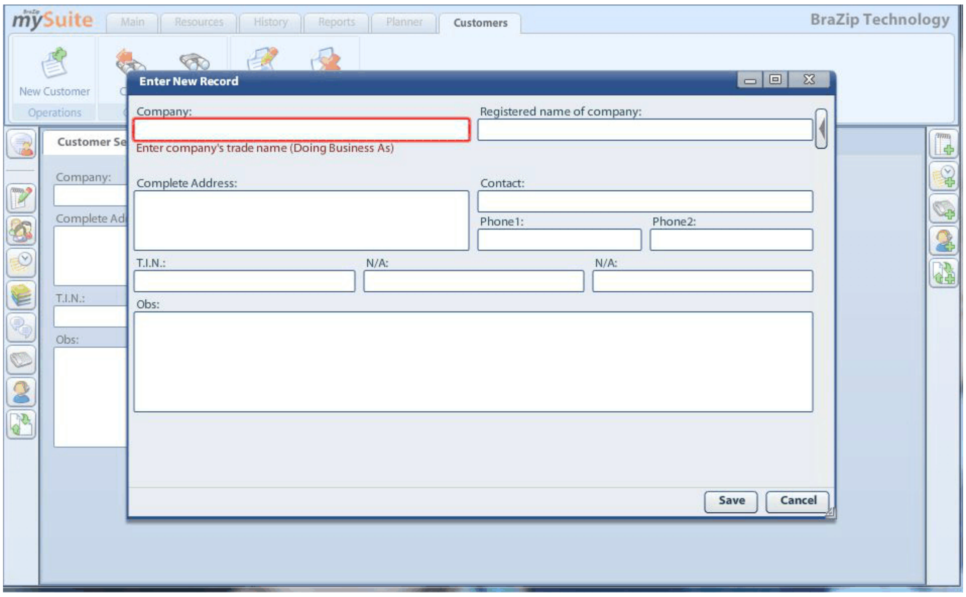
**Hint:**

Registration information refers to a co-worker’s own information: Name, Last Name, email, and, ABOVE ALL, Password. To guarantee greater security for information in the system, only the user can change his or her password.

# 6.2. Customer

## 6.2.1. Registering a Business as a Customer

Register information for a business that is your customer. This registration is IMPORTANT so that, later, you can link a “User” to a “Business” and check that customer’s history.

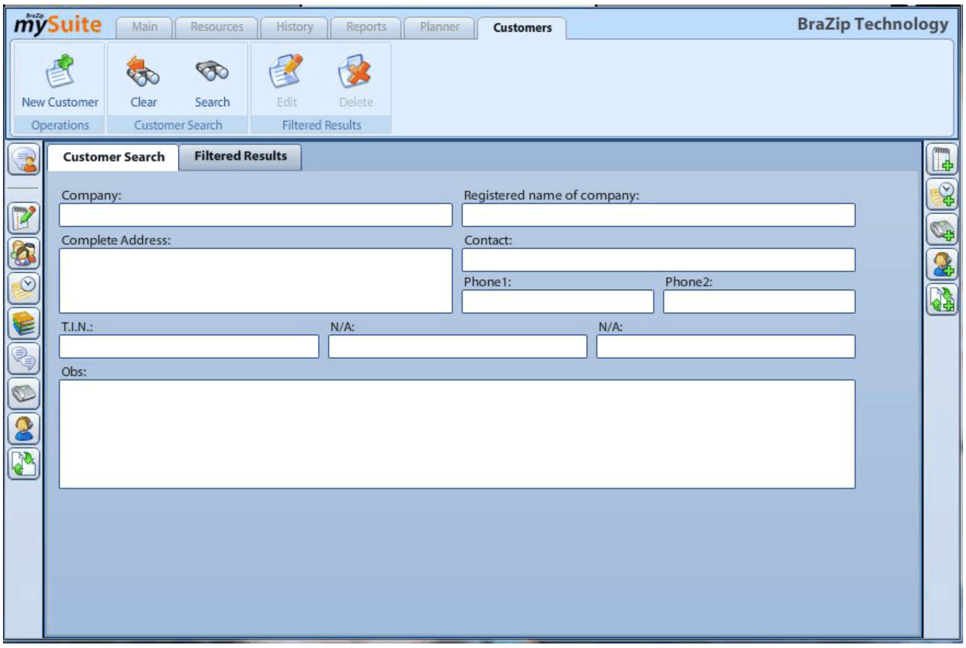



To register a new Business as a Customer:

- Access the “Main” Toolbar.
- Click "Customer”.
- Click “New Customer”.
- Fill in the necessary fields in the popup window.
- Click “Save”.

Repeat this procedure to register other customers.

## 6.2.2. Searching for a Customer



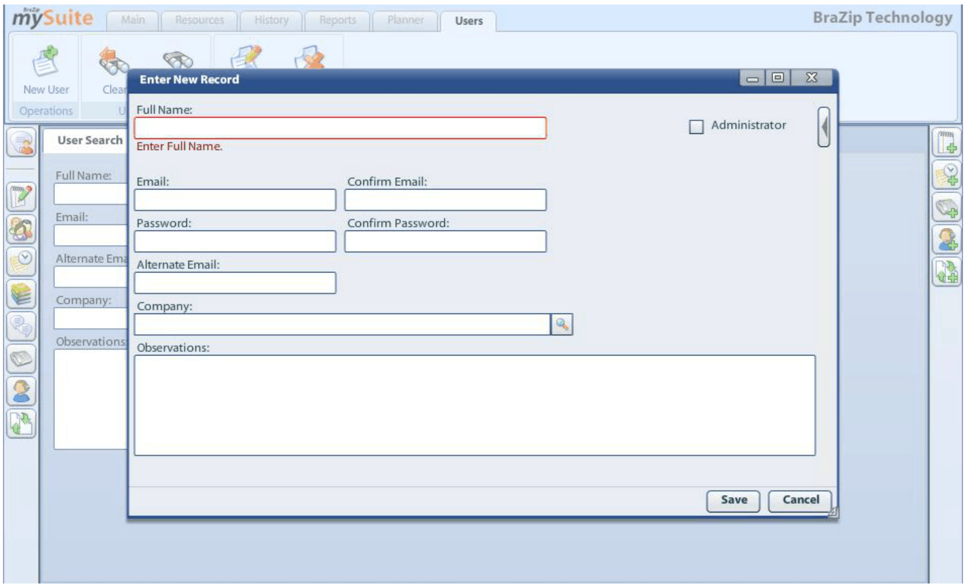

To search for a business customer:

- Access the “Main” Toolbar.
- Click “Customers”.
- Fill in the appropriate fields with the information you want to search for (You may use partial, rather than complete, information).
- Click “Search” or press “Enter”.
- The results of your search will be shown in the “Search Results” Toolbar.
- Double click the company name you are looking for.

After searching, you can change the Business Customer’s data using the “Edit” button or even delete it from the system by clicking on the “Delete” button.

# 6.3. User

## 6.3.1. Registering Users




To register a new User:
- Access the “Main” Toolbar.
- Click “Users”.
- Click “New User”.
- Fill in the respective fields.
- Click “Save”.

Repeat this process to register other users.

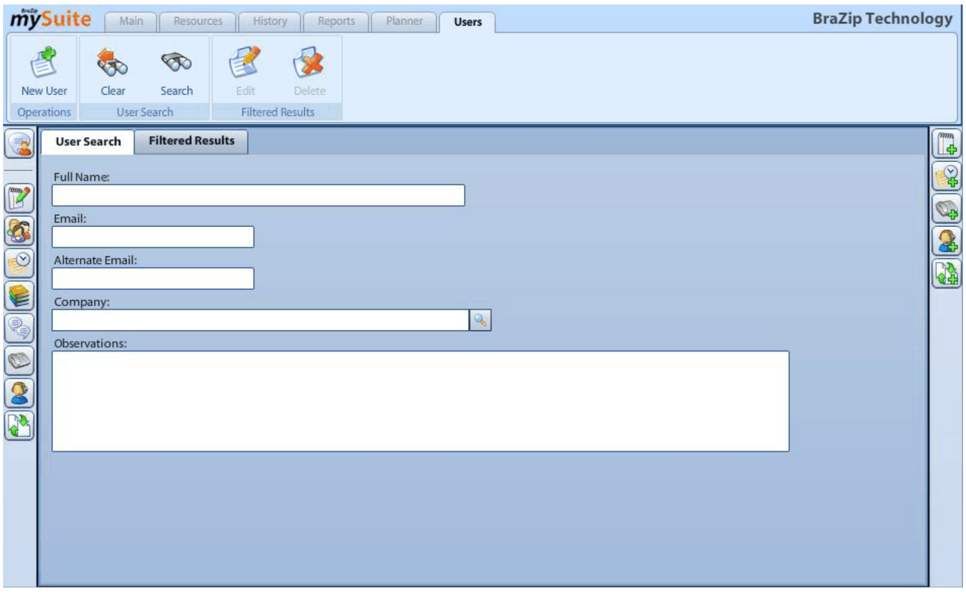
**Hints:**

**1)** Marking **Administrator** lets a user see all of another other users' tickets from the same “Business Customer”. As an administrator, the user can even with third party tickets, with those actions being registered.

**2)** “**VIP User**” lets you register a business customers’ users so that they can initiate a chat. A VIP user installs BraZip Central, which keeps him or her connected to mySuite’s servers. In this way, your business will be able to call that user for a chat at any time. (You must subscribe to this resource separately. If interested, contact your account’s commercial manager.)

**3)** We can create an “**inactive**” field to control access to the “Customer Relations” area (Help Desk, Identified Online Support, and Knowledge Base Manager). Inactive users will not be able to access or ask for support. If interested, all you need to do is ask BraZip’s technical staff.

## 6.3.2. Searching for a User




To search for a User:
- Access the “Main” Toolbar.
- Access the “Users” menu.
- Fill in the fields with the information you want to search for. (You may use partial information, if you wish.)
- Click “Search”.
- In the “Search Results” field, you will see a list of results.
- Double click the desired user’s name.

After searching, you may alter the user’s data by clicking “Edit”. You may also remove a user from the system by clicking on “Delete”. In order to do either of these actions, you need only highlight that user's name, if there is more than one user listed in your search results.