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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.
- **Subscription Management** – Renew and Upgrade your Open Edge Developers Kit subscriptions.
- **Enhanced reports** – Run a number of license related reports such as 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 License Upgrades and expanded payment options.

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 use the Contact Us form in the site or email them directly to cssfeedback@progress.com.
Accessing the Customer Self Service (CSS) Web Application

https://secure.progress.com/css

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 Home Page
The CSS Home Page was designed to give you quick access to the information you need.

Quick Links
The quick links give you instant access to the site’s most frequently used features.

Drop Down Menus
The Drop Down Menus allow you to easily find all the functionality that the site has available. The menus are broken down into the following groups:

HOME – Click HOME to return to this page.
ACCOUNT – Contains links to all the features related to your account including your orders, products and services.
ADMINISTRATION – Contains links to the User Administration Reports Administration functions.
APPLICATIONS – Contains links to other Progress resources such as Progress Community and Downloads.
CONTACT US – Opens the Contact Us form so you can quickly communicate with the Progress resources you need.
USER NAME – Click on the User Name to gain access to your user profile functions.

Switching Accounts – Account Info
The Account Info link opens up the section containing information related to the account that you are currently viewing. If you are a member of multiple accounts, it will also contain the link (Switch) needed to switch to another account.
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.

Order Search Criteria

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

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

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.
Select Order Number to search for a specific order.

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.

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**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.

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.
Invoice Search Criteria

View Invoices

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

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

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 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.

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.

Invoice Categories
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 the Invoice Number 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.

**Schedule Report**

If you would like to receive a list of your invoices on a periodic basis, you can schedule it to be run automatically. The reports are run at 8:00 am EST on a weekly or monthly basis. You will receive an email notifying you when it is ready to be downloaded. This is a great way to get a list of your current unpaid invoices on the schedule of your choice.

**Pay Invoices**

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

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

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

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 **Pay Now** button to begin the payment process.
Making Payments and Managing Credit Cards

The online Payment Page allows you to make payments using a credit card. You can choose to enter your credit card information for a single use or save your information, which will make paying next time fast and easy.

Note: For your security, all credit card data is entered and stored on the PayTrace secure portal. No credit card information is retained by Progress Software.

If you have previously saved a credit card for future use, you can select the card and proceed to pay. Otherwise, select “Add new card” to enter a new credit card for payment.

Note that, when adding a New card, you have the option to save the card for future use or simply use this card for a single transaction.

Update

Click Update to update the Expiration Date or CCV number on your saved credit card.

Delete

Click Delete if you wish to remove a card from this list.

When paying with a new card or updating an existing card, you will be redirected to the secure Progress Payment Portal, hosted by PayTrace.

Enter the credit card information in the portal and click Process Transaction to complete your payment. Upon confirmation, you will be redirected back to the Progress CSS page where you began the payment process.
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.

Record Grouping

Drag and drag the column label for End User Name, Current Expiry Date or both into the grouping section provided. The grid contents will automatically be divided into the selected groups to make it easy to find the licenses that you want to renew.

Contact Us

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

Simply add your comment and click the 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.

<table>
<thead>
<tr>
<th>Product Description</th>
<th>License Type</th>
<th>Service Level</th>
<th>Current Expiry Date</th>
<th>New Start Date</th>
<th>New Expiry Date</th>
<th>Total Price</th>
<th>Action</th>
</tr>
</thead>
</table>

**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.
**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.

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 **Proceed to Approval** button.

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

Select if you wish to Pay Online immediately for your renewal with a Credit Card or if you prefer to be Billed later by invoice. See the **Making Payments and Managing Credit Cards** section for details.

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.*
Reports

The Customer Self Service Website provides access to a number of reports intended to help you manage your software licenses. Click on one of the report links to get the data you are looking for.

Any of the reports can be run on-demand or can be setup to run on the schedule of your choice.
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 Download Report 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

![Media Status Grid Image]

#### 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.

#### Schedule the Report
Click the Schedule Report button to have the report run for you on the day(s) that you choose. A popup window containing the report scheduling options will appear.

Using the dropdown list, select the frequency that you would like to have the report run. Note that the reports generate at 8:00AM Eastern Time (UTC-05:00) and will continue to execute until the Run Until date is reached.

- **Once** – Will allow you to select a single date on which the report should be run.
- **Daily** – The report will be run every day.
- **Weekly** – Allows you to select which day of the week the report should be run.
- **Monthly** – Provides various options for selecting which day of the month the report should be run.
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 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

**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.

**Schedule the Report**
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**Weekly** – Allows you to select which day of the week the report should be run.

**Monthly** – Provides various options for selecting which day of the month the report should be run.

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**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.

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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.

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**Schedule the Report**

Click the **Schedule Report** button to have the report run for you on the day(s) that you choose. A popup window containing the report scheduling options will appear.

Using the dropdown list, select the frequency that you would like to have the report run. Note that the reports generate at 8:00AM Eastern Time (UTC-05:00).

**Once** – Will allow you to select a single date on which the report should be run.

**Daily** – The report will be run every day.

**Weekly** – Allows you to select which day of the week the report should be run.

**Monthly** – Provides various options for selecting which day of the month the report should be run.
My Reports

Scheduled Reports Management
The primary Reports page contains the details for any scheduled reports. Use this page to update or delete existing scheduled reports or view the report results that were last generated.

Scheduled Reports Tab

The Grid under the Scheduled Reports tab contains all of the details for any scheduled reports. Use the Update button to change the report frequency or the Run Until date.

Generated Reports Tab

The Grid under the Generated Reports tab contains all of the details for any reports that have been run. Click on the “View Report” link to download your report.
Download OpenEdge Activation Files

The Activation file functionality in the CSS Site allows you to create a custom Activation File, that can be used as an input to the OpenEdge Installer, or a Progress.cfg file that can be copied directly onto a system that has had a previous OpenEdge installation.

*See the OpenEdge Installation documentation for more details regarding the usage of these files.*

Previous Configuration Grid

The data grid in the Download Activation Files page displays all of the configurations that were previously created. Use the action selection within the grid to perform one of the following actions:

1. Download Activation File
2. Download Config File
3. View
4. Edit
5. Delete

Create New Activation File

The Activation File Wizard allows you to select a group of licenses that are assigned to the same End User and are part of the same Version and Platform to create a custom configuration.
Registered End User – Select a valid End User by typing in this field. The Auto Lookup will display the end users that match the value entered. Choose the End User from the list when you find the one you are looking for.

OpenEdge Version – Select the OpenEdge Version for the configuration you wish to build. This Usage of this functionality is compatible with all OpenEdge versions 10.2b or later.

Platform – Choose the Platform that the configuration will be installed on.

Click Next to proceed with the License Selection step.

Scroll through the list of available products or use the grid filtering to find the licenses that you want to include in the configuration.

Select the licenses to include by clicking Add All to include the entire grid contents, or the button to select individual licenses.

Click Save when you are finished selecting the licenses that will be included in the Activation or Config file.

Enter a Reference Name that you can use to find the configuration later and accept the Progress Terms and Conditions.
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 **Edit** button if you want to change the role of a member in your organization.

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

**Delete a Member**

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

Click to **Delete** 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.

Click **Add** to add the user to your account. Check the Send notification message checkbox if you wish to send an invitation email to the new member.