



**POWER SOLUTIONS
INTERNATIONAL**

SUPPORT PORTAL USER GUIDE

JANUARY 2022 v1

**Support Case File System
Knowledge System**

CUSTOMER USER GUIDE

POWERING FORWARD

Contents

Preface.....	3
Accessing the Mize System.....	3
Password policy.....	3
System Support	4
Home Screen	4
Classic View	5
Dashboard View	5
Navigation and Searching.....	6
Side Menu.....	6
Search Bar.....	6
Inbox Search	7
Advanced Search	7
Saved Search.....	8
How to Submit a New Support Ticket	10
Request Tab.....	10
Service Tab.....	11
Activity Tab	12
Comments & Communication	12
Knowledge	13
How to access knowledge	13
Knowledge Filter Pane.....	14
How to Search Using Keywords.....	15
Knowledge Search Tips.....	15
Provide feedback on Knowledge Objects.....	16
PRODUCT 360	17
How to access Product 360	17
Understanding Product 360	18
Helpful Resources & Training Videos	Error! Bookmark not defined.

The PSI Customer Engagement Platform uses software architecture called “Mize”. In this user guide you will notice the system is referred to as “Mize”.

Preface

The Mize system includes “SmartBlox” which are accessible depending on your access level. This user guide is intended to provide training on the SmartBlox shown below.

- **Knowledge**
- **Support**



Knowledge



Support

Please refer to the Warranty system user guide for training specific to the Warranty, Returns, and Registration SmartBlox.

The Mize system works best when using **Google Chrome Internet Browser**. The link below will allow you to download Google Chrome to your computer.

<https://www.google.com/chrome/>

Accessing the Mize System

To access the Mize system, you will follow the link provided below.

<https://psiengines.mizecx.com/login.html>

Credentials will be provided to you by PSI Customer Care Management.

Password policy

You will need to reset your password upon your first login attempt. Your password will require a reset every 45 days. In the event you forget your password you can use the forgot password link found at the login screen.

- Minimum password length 12
- Maximum password length 16
- At least one uppercase letter
- At least one lowercase letter
- At least one non-alphanumeric character
- Allowed special characters [#\$%@-_]
- Passwords are set to expire after 45 days
- Password reuse is not allowed (system will remember the last 10 passwords)
- Password lockout will occur after 5 failed login attempts



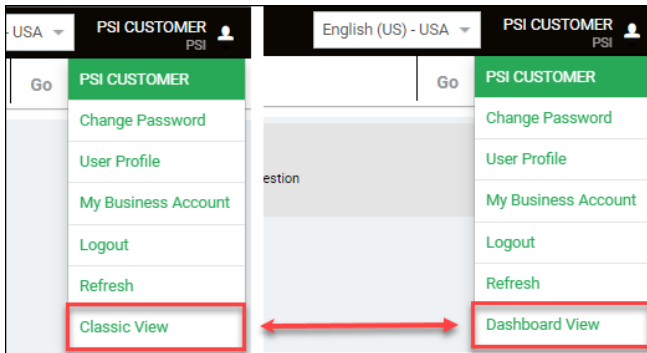
The screenshot shows a login interface with two input fields: the top one has a person icon and the bottom one has a lock icon. Below the password field is a green link that says "Forgot Password?". At the bottom right is a black button with the word "Login" in white text. A green arrow points from the "Forgot Password?" link in the text above to the link in the screenshot.

System Support

In the event you have a question or need support while using the Mize system please submit a support request to PSI at service@psiengines.com

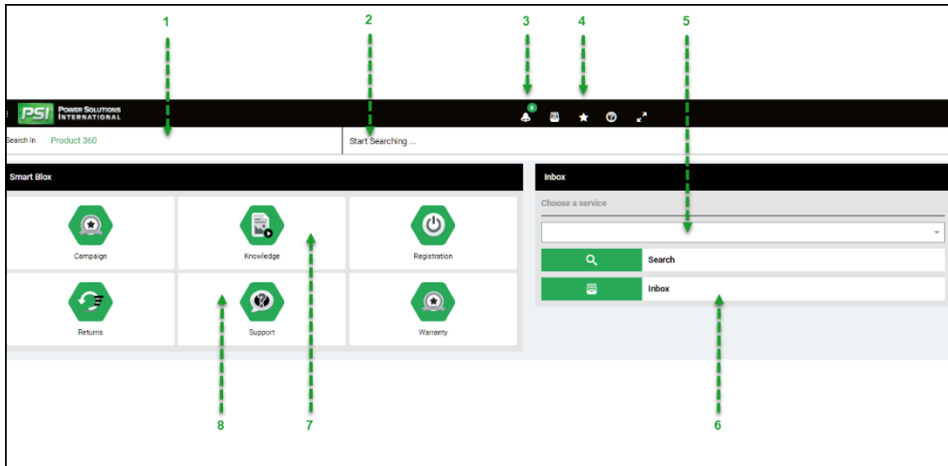
Home Screen

You can change your home screen between Dashboard View and Classic View by navigating to the top right of the page and selecting “Classic View” or “Dashboard View”



Classic View

Once you are at the home screen you will see the screen as shown below. Please review the names of each section so you are familiar with navigating through the home screen.

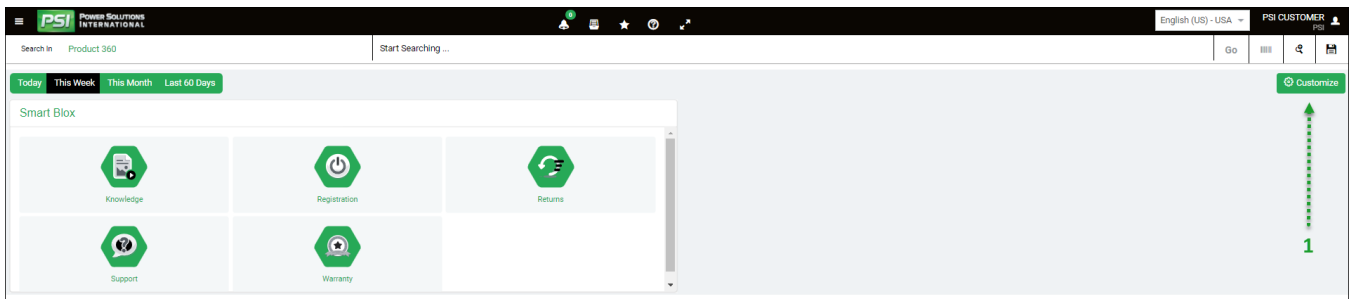


- 1) **“Search In” Selector** – Change this selection to perform a system search
- 2) **Wildcard Search Box** – This is a wildcard search field based on the “Search In” selection from item 1
- 3) **Alerts** – The alerts bell will show the number of alerts designated for you
- 4) **Favorites** - Access your favorites by selecting the star
- 5) **Inbox Menu** – Change the selection using the inbox menu to navigate to your inbox
- 6) **Inbox** – Your inbox will give you quick access to items that are in your work queue
- 7) **Knowledge SmartBlox** – Access to the Knowledge section of Mize
- 8) **Support SmartBlox** – Access to the Support ticketing system of Mize

Dashboard View

Dashboard view will contain all the same visuals as the Classic view with the exceptions below.

- 1) **Customize Button** – You can customize your dashboard by adding panels that you want to see into the screen
- 2) **Inbox** – Inbox will not show automatically. You will need to add it to your dashboard using customize if you want to see this as a panel.



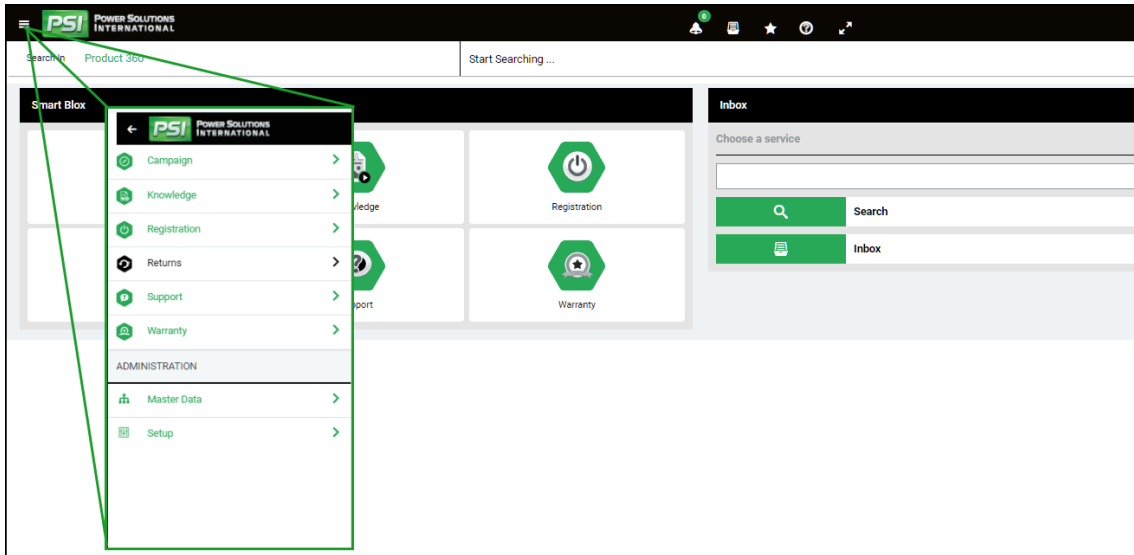
Navigation and Searching

You can navigate through the system using multiple methods within the system.

Side Menu

Open the side menu on the left side of screen by selecting the three horizontal bars at the top left of page

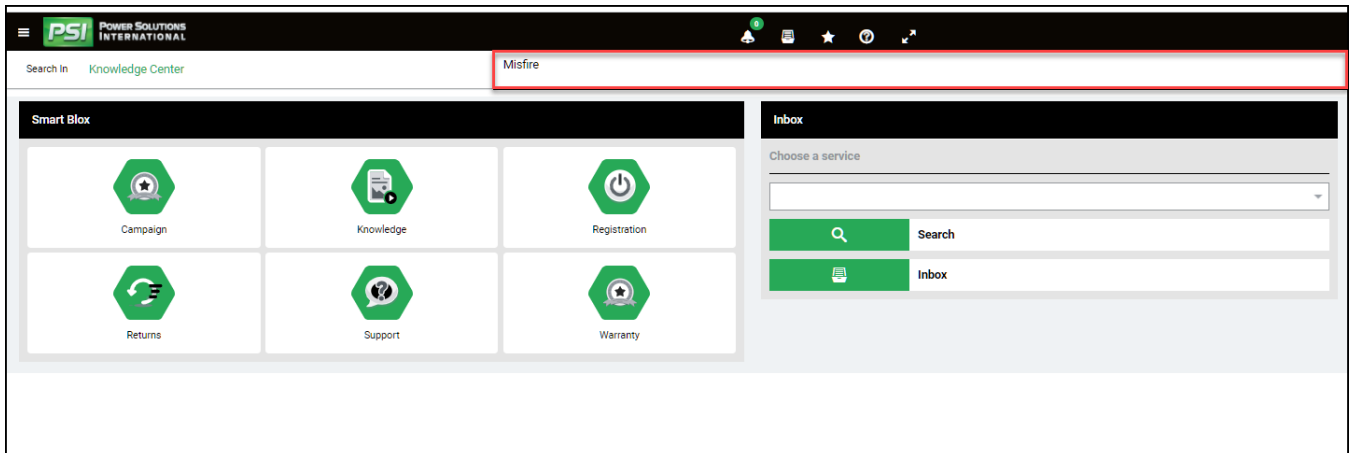
- Option to search Knowledge
- Option to search Support
- Option to search Warranty (if enabled)



Search Bar

Another method of searching is using the Search bar at the top of the page

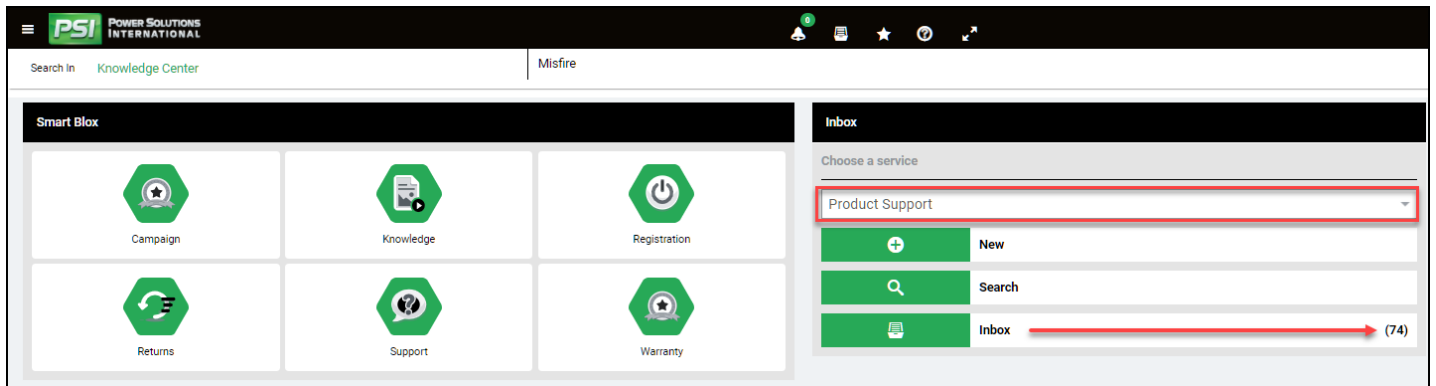
- Change the drop-down option next to “search in” to alternate between the sections you want to search in
- To Enhance a search in the search bar, use double quotes (“) before and after the word or number you are searching for. **Example = “Misfire”**



Inbox Search

Inbox Search is used to easily identify support tickets that are assigned to you or that are in your WorkQueue.

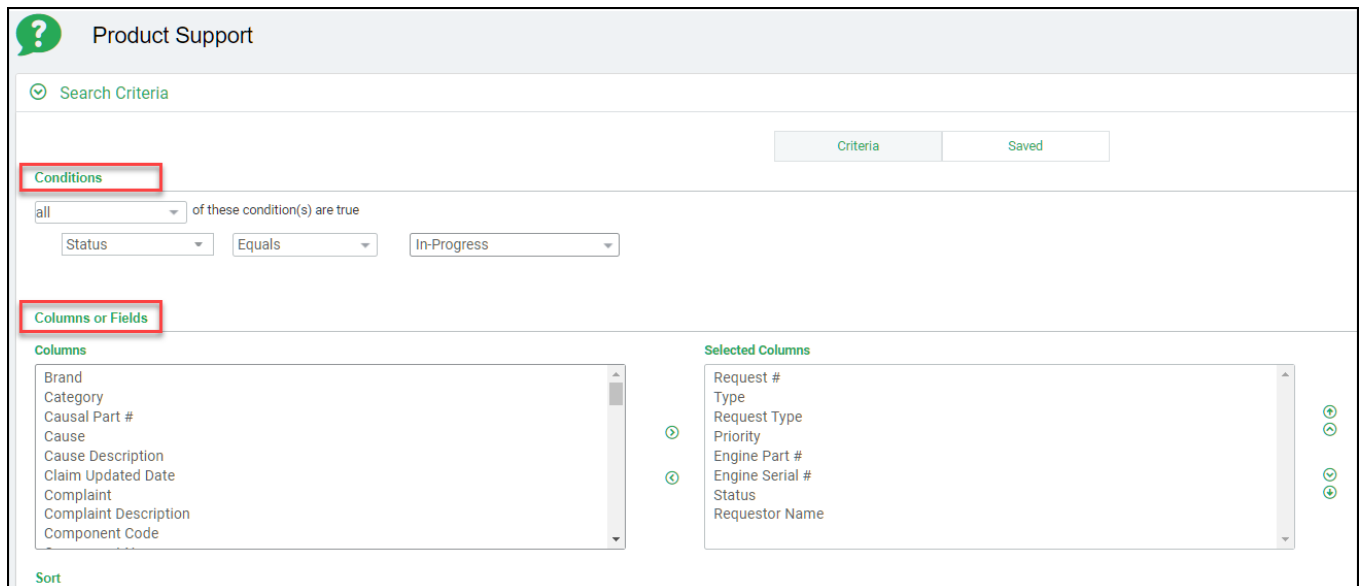
- To access your inbox, change the drop-down box in the home screen to Product Support.
- If you have support tickets in your inbox you will see a number appear in the Inbox row.



Advanced Search

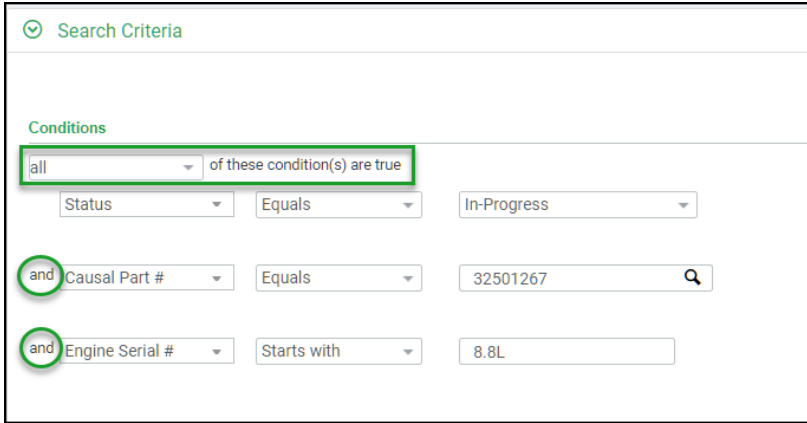
Advanced Search will provide you with more options for searching the system

- You can navigate to Advanced Search by following the path below
 - o Support → Search → Enter your Conditions → Edit the columns of data you want to see
- You can add multiple conditions to the search including changing the “all” or “any” drop down selection box.



In this example below the user has setup the search conditions with three (3) conditions. The search will provide case files which all three (3) conditions are true.

- Condition 1** → Status **equals** "In-Progress"
- Condition 2** → Causal Part # **equals** "32501267"
- Condition 3** → Engine Serial # **starts with** "8.8L"



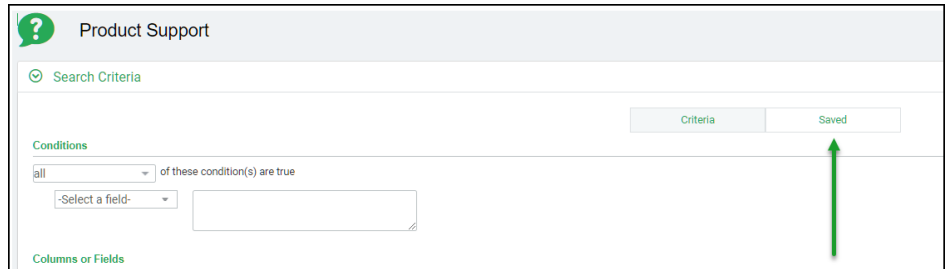
The screenshot shows a 'Search Criteria' form with the following fields:

- A dropdown menu set to 'all' with the text 'of these condition(s) are true' below it.
- Condition 1: Status (dropdown) Equals (dropdown) In-Progress (dropdown).
- Condition 2: Causal Part # (dropdown) Equals (dropdown) 32501267 (text input with search icon).
- Condition 3: Engine Serial # (dropdown) Starts with (dropdown) 8.8L (text input).

Saved Search

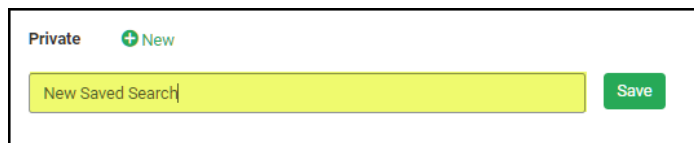
If you perform specific searches on a regular basis you can create a saved search. The saved search will allow you setup the conditions and the columns so you can quickly perform the search without spending time setting up your specific search. Follow the steps below to create a saved search.

1. Select the Saved button



The screenshot shows the 'Product Support' search interface. At the top right, there are two buttons: 'Criteria' and 'Saved'. A green arrow points to the 'Saved' button. Below the buttons, the 'Conditions' section is visible with a dropdown set to 'all' and a text input field containing '-Select a field-'.

2. Select **+ New**
3. Name your search



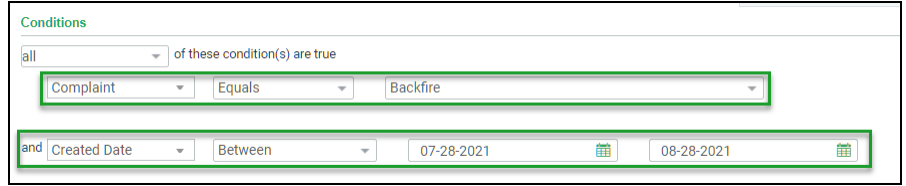
The screenshot shows a dialog box for creating a new search. It has a title 'Private + New'. Below the title is a text input field containing 'New Saved Search' and a green 'Save' button.

4. Select the Criteria Button



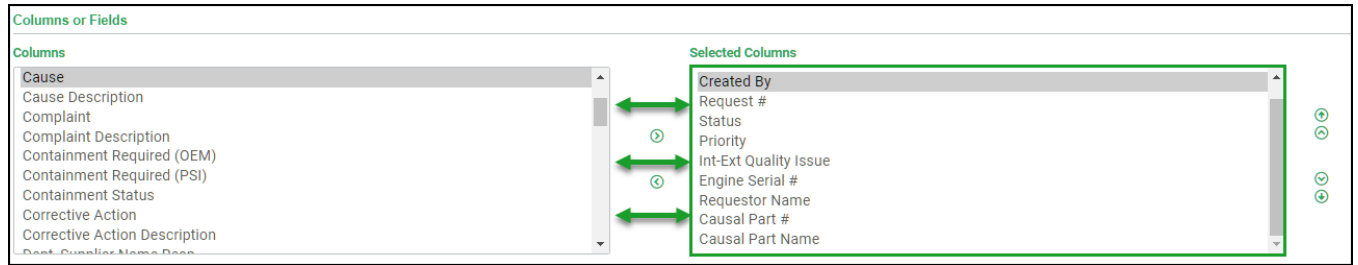
The screenshot shows the search interface with the 'Criteria' button highlighted in yellow, indicating it is the selected option.

5. Configure the conditions you want to search for

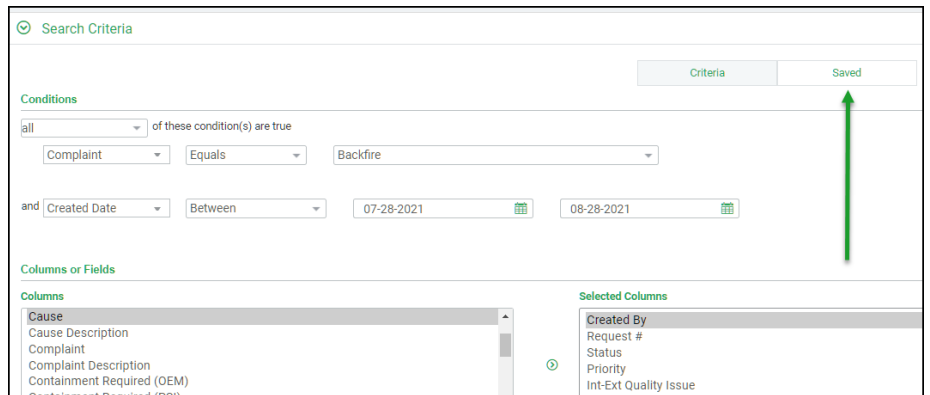


6. Select the Columns you want to show in your search

- a. Left Box = Available columns of data
- b. Right Box = Selected columns of data

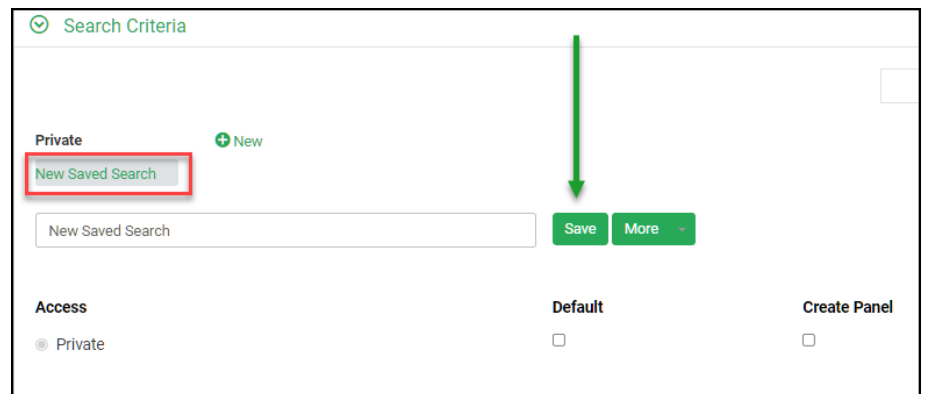


7. Navigate back to the Saved section by selecting the Saved Button



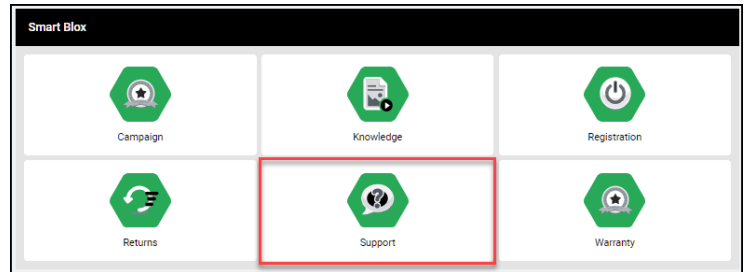
8. Select the save button

Your new saved search will appear in the section shown in the red box

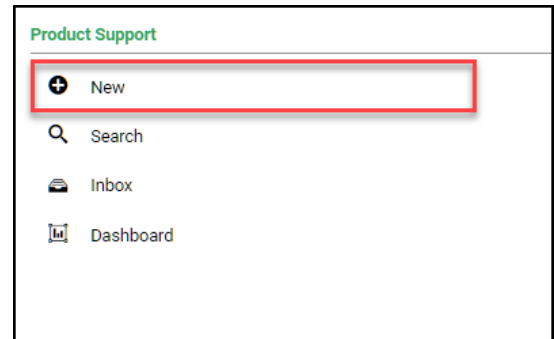


How to Submit a New Support Ticket

1. Navigate to the Support Smartblox from your home screen

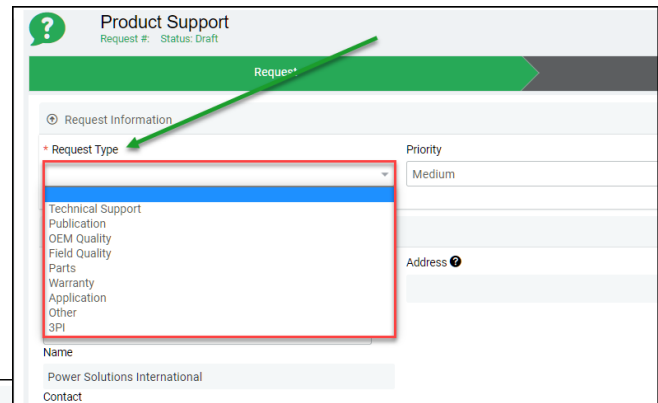


2. Select New

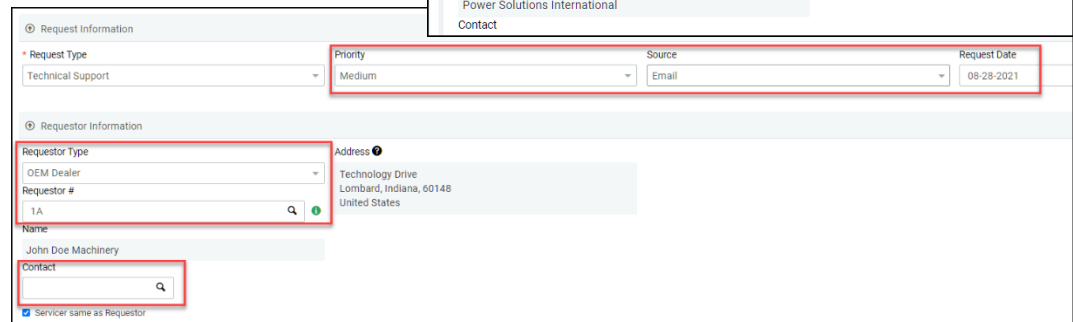


Request Tab

1. Select your Request type



2. Fill in the fields shown on the screen
 - a. Priority
 - b. Source
 - c. Request Date
 - d. Contact



IMPORTANT
If your contact information is not already stored in the contact search screen, add your contact information by selecting the (+) symbol

Service Tab

Fill in the information relevant to the support request

Note: If you do not have a valid PSI engine serial number select Product Source as “Other”

Saving & submitting a new Support Ticket

Once you have the support ticket filled out you can either Save or Submit. In both cases a unique Support Ticket number will be assigned. Support ticket numbers start with a prefix of “ST” to indicate it is a Support Ticket. The two digits after the ST prefix indicate the calendar year which the support ticket was created.

ST20XXXX = Support Ticket was created in 2020

ST21XXXX = Support Ticket was created in 2021

ST22XXXX = Support Ticket was created in 2022

Save → This will save the ticket in in draft status.

Submit → This will submit the ticket and the ticket will be in “Submitted” status

Note: In order for PSI to review and respond to a case file the case file must be “**SUBMITTED**” to PSI. PSI does not review draft case files.

Product Support

Request #: Status: Draft

View ▾ More ▾ Save Submit ✕

Request
Service
Parts

Product Information

Product Source	Brand	Engine Serial #	Engine Part #
<input type="text"/>	<input type="text" value="PSI"/>	<input type="text" value="8.8L0015128"/>	<input type="text" value="39003090"/>
Engine Part # Description	Market Type	Transaction Date	Engine Build Date
<input type="text" value="Engine, Service 8.8L Industrial Non-Cert"/>	<input type="text" value="Industrial"/>	<input type="text" value="08-22-2019"/>	<input type="text" value="08-01-2019"/>
Usage	UOM	Line Built	Job #
<input type="text" value="50.00"/>	<input type="text" value="Hours"/>	<input type="text" value="C3"/>	<input type="text" value="123456"/>
Engine Size	Assembly Area		
<input type="text" value="8.8L"/>	<input type="text"/>		

Complaint Information

Complaint	Category
<input type="text" value="Fitment Issue"/>	<input type="text" value="Intake"/>
Complaint Description	
<input type="text" value="Pipe does not fit properly on the elbow"/>	
Cause	Corrective Action
<input type="text" value="Bent"/>	<input type="text" value="Send Parts at no cost"/>
Cause Description	Corrective Action Description
<input type="text" value="Pipe is bent at the wrong angle"/>	<input type="text"/>

Causal Part Information

Is Service Part	Causal Part Type	Causal Part #	Name
<input type="checkbox"/>	<input type="text" value="Standard"/>	<input type="text" value="80000111"/>	<input type="text" value="Pipe, Coolant Crossover B"/>

Activity Tab

The activity section serves multiple purposes as shown below.

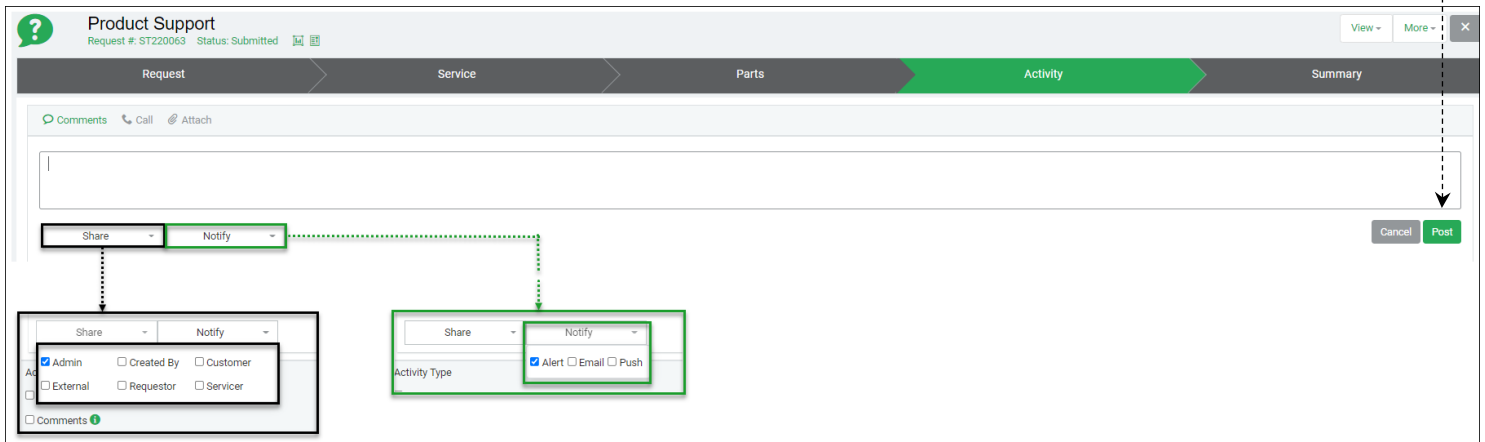
- **Add comments**
- **Communicate with PSI on case file status, updates, answers to questions, etc**
- **Add Attachments**

The **“Share”** drop down box will allow you to share the comment with PSI

The **“Notify”** drop down box will allow you to notify PSI with an alert or email if you check the applicable box

If you add a comment and want PSI to get an **“Alert”** that you added the comment you will check the **Share “Admin”** and check the **Notify “Alert”** box.

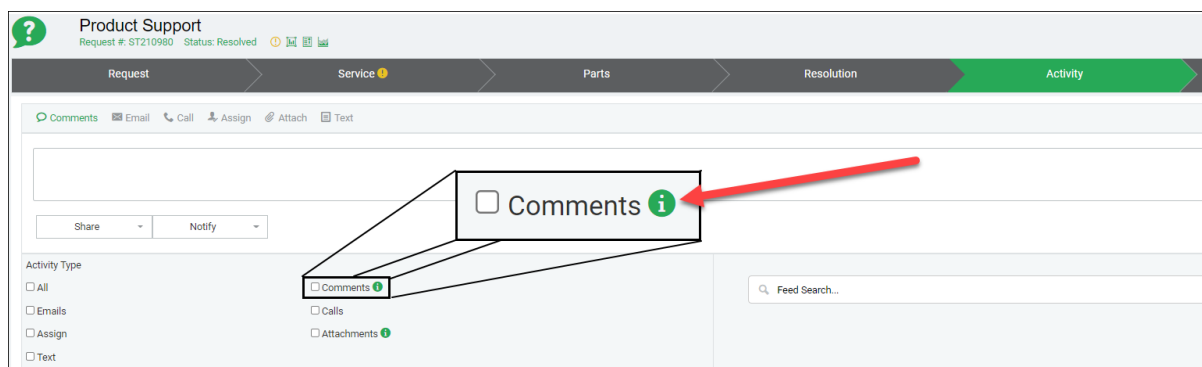
Note: Make sure you selected the **“POST”** button when you want to save a comment.



Comments & Communication

Use the comments box to communicate with PSI on your case file. The comments will be date/time stamped and retained in the system so each user can see the communication history directly in the case file.

To view a summary of the communication, select the **“i”** icon as shown next to the red arrow below



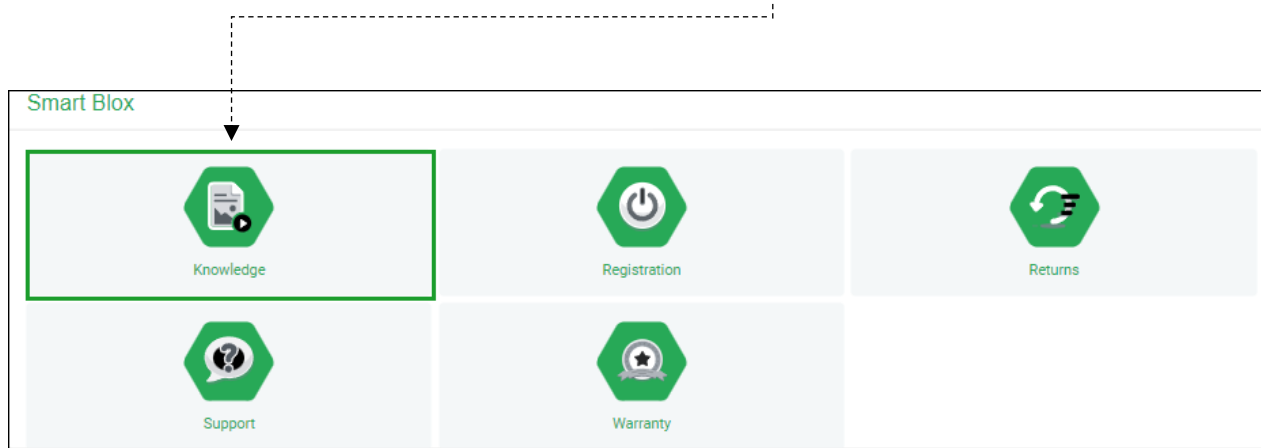
Knowledge

The knowledge section will allow you to gain access to various types of knowledge information. The list below are examples of what type of knowledge you can access. We are continuously adding new information, keep you eye on newly released knowledge objects.

- Engine Service Manuals
- Diagnostic Manuals
- Owner’s Manuals
- Wiring Diagrams
- Product Bulletins
- Tech Tips and Repair Guidance
- Product Training
- Diagnostic Software Downloads

How to access knowledge

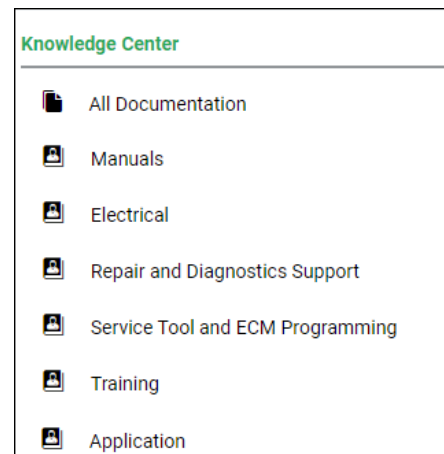
To access knowledge, you will select the Knowledge smartblox icon from your home screen.



After selecting the knowledge icon, you will land in the Knowledge Center. This is your first step in filtering the knowledge information to get what you are seeking.

Knowledge is categorized into of the categories shown here.

If you do not know what category you will find the information in, you can select the “All Documentation” option.



Knowledge Filter Pane

When you are in the knowledge category you will use the filter pan on the left side of the screen to filter down the knowledge objects.

The filters include market type, document type, engine displacement, and diagnostic code.

The image shows a screenshot of a web application interface. On the left is the 'Filter Results' pane, and on the right is the 'Search Results' pane. The 'Filter Results' pane has a 'Reset' button at the top right. Below it are five dropdown menus: 'Market Type', 'Document Type', 'Displacement', 'Diagnostic Code (Fault Code)', and 'No Of Ratings'. These five dropdowns are enclosed in a red rectangular box. Below the dropdowns is a 'Serial Range' section with an input field labeled 'Enter Serial Number'. Underneath is a 'Search within results' section with three input fields: 'Search Query', 'Start Date' (with a calendar icon), and 'End Date' (with a calendar icon). At the bottom of the filter pane are two buttons: 'Search' and 'Clear'. The 'Search Results' pane on the right shows 'Your request so far:' with two checkboxes: 'Hide Summary' (checked) and 'Hide Metadata' (unchecked). Below this are several search results, each with a title and a document type/market type description. The results include: 'PSIKO210121 Doosan V Engine Valve', 'PSIKO210117 4.3L and 5.7L Distributor', 'TTB032021 - Appropriate Use of Cylinder', 'PSIKO210130 Tech Tip Catalyst Damage', 'PSIKO210082 Fan Mounting Screw Torque', 'PSIKO210062 MAP Sensor Identification', and 'PSIKO210061 SPN 518 FMI 2 Diagnostic Code'.

Filter Results

Market Type

Document Type

Displacement

Diagnostic Code (Fault Code)

No Of Ratings

Serial Range

Enter Serial Number

Search within results

Search Query

Start Date

End Date

Search Results

Your request so far:

Hide Summary Hide Metadata

PSIKO210121 Doosan V Engine Valve
Document Type : Tech Tips | Market Type : Energy | Di

PSIKO210117 4.3L and 5.7L Distributor
Document Type : Videos | Likes : 0 | Market Type : Ene

TTB032021 - Appropriate Use of Cylinder
Document Type : Tech Tips | Market Type : Energy | Di

PSIKO210130 Tech Tip Catalyst Damage
Document Type : Tech Tips | Likes : 0 | Market Type : E

PSIKO210082 Fan Mounting Screw Torque
Document Type : Tech Tips | Market Type : Energy | Di

PSIKO210062 MAP Sensor Identification
Document Type : Tech Tips | Part # : 33002243,3300224

PSIKO210061 SPN 518 FMI 2 Diagnostic Code
Document Type : Fault Codes | Diagnostic Code (Fau

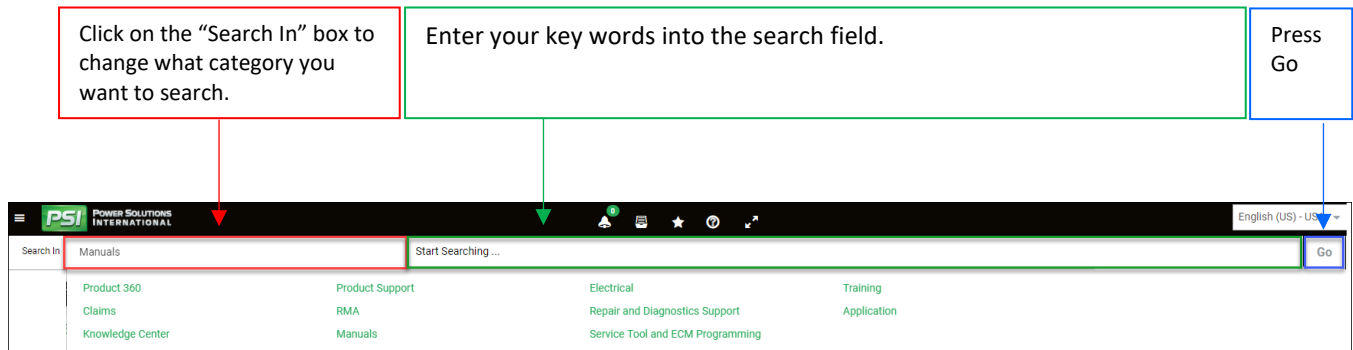
How to Search Using Keywords

The top search bar can be used to perform keyword searches.

Click on the “Search In” box to change what category you want to search.

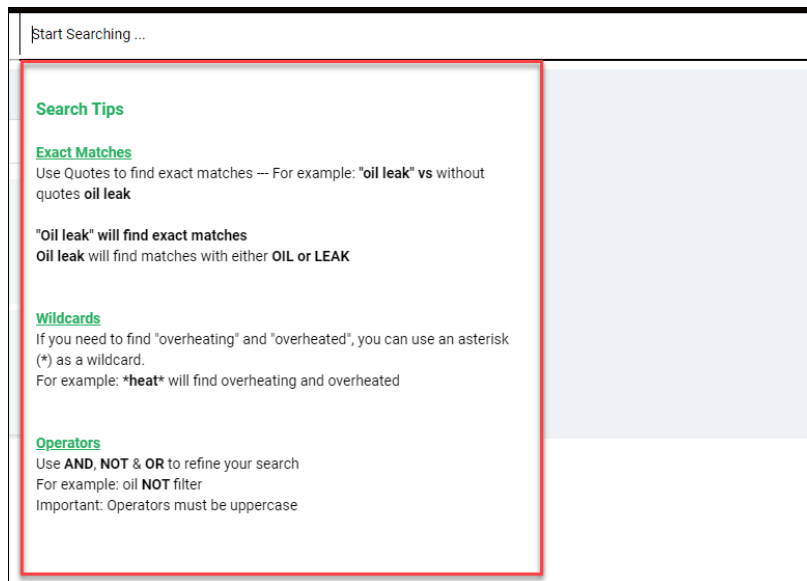
Enter your key words into the search field.

Press “Go”



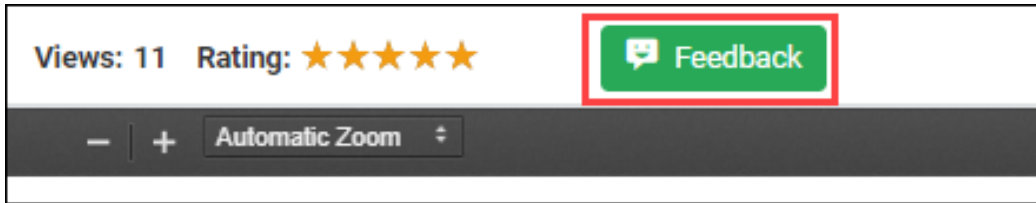
Knowledge Search Tips

Notice when you click on the empty search bar you will see a “Search Tips” popup appear. This will provide you guidance on how to optimize your search.



Provide feedback on Knowledge Objects

Your voice is important to PSI. While you are viewing a knowledge object you can provide feedback to PSI using the “Feedback” button at the top of the page.



Rate the knowledge object from 1 to 5 stars based on your experience with the knowledge object.

1 Star = Lowest Rating

5 Stars = Highest Rating

IMPORTANT

YOU WILL ONLY HAVE ACCESS TO ENGINES IN PRODUCT 360 THAT **YOUR COMPANY PURCHASED DIRECTLY FROM PSI.** IF YOU ARE AN OEM DEALER AND DID NOT PURCHASE THE ENGINE DIRECTLY FROM PSI YOU WILL NOT SEE THE ENGINE IN PRODUCT 360

PRODUCT 360

Product 360 is an extremely valuable tool within the system. Product 360 shows you a complete “360 Degree” view of all things related to a specific engine serial number.

Knowledge objects are applicable to specific engine serial numbers can be access using Product 360. This means if you have the engine serial number you can use Product 360 to get quick access to the correct service manuals, wiring diagrams, bulletins, repair guidance, and more.

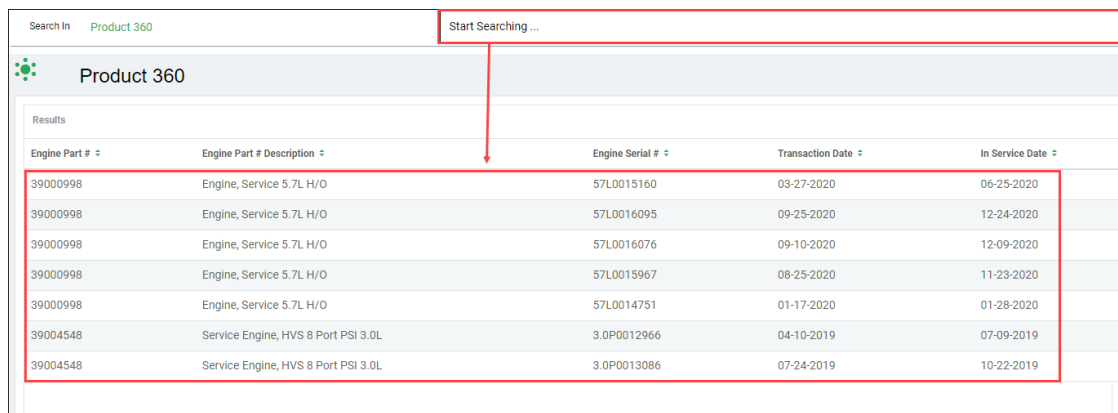
You can also create new case files directly from Product 360, review warranty history and past case file history, as well as view warranty coverage information associated with the engine serial number.

How to access Product 360

Use the top search bar with Product 360 selected the “Search In” box
Enter the engine serial number in the search bar and press Go



Alternatively, you can leave the search box blank and press go, the results will show all the engines which your company has purchased directly from PSI. You can access Product 360 from any of those results by selecting one of the engine serial numbers found in the search.



Engine Part #	Engine Part # Description	Engine Serial #	Transaction Date	In Service Date
39000998	Engine, Service 5.7L H/O	57L0015160	03-27-2020	06-25-2020
39000998	Engine, Service 5.7L H/O	57L0016095	09-25-2020	12-24-2020
39000998	Engine, Service 5.7L H/O	57L0016076	09-10-2020	12-09-2020
39000998	Engine, Service 5.7L H/O	57L0015967	08-25-2020	11-23-2020
39000998	Engine, Service 5.7L H/O	57L0014751	01-17-2020	01-28-2020
39004548	Service Engine, HVS 8 Port PSI 3.0L	3.0P0012966	04-10-2019	07-09-2019
39004548	Service Engine, HVS 8 Port PSI 3.0L	3.0P0013086	07-24-2019	10-22-2019

Understanding Product 360

In the product 360 page you will find multiple pieces of information, including the information below.

- Engine Part number and name
- Transaction date from PSI to your company
- In-Service date (warranty start date)
- Warranty coverage information
- Knowledge information associated with the specific engine
- Claim History
- Product Support History

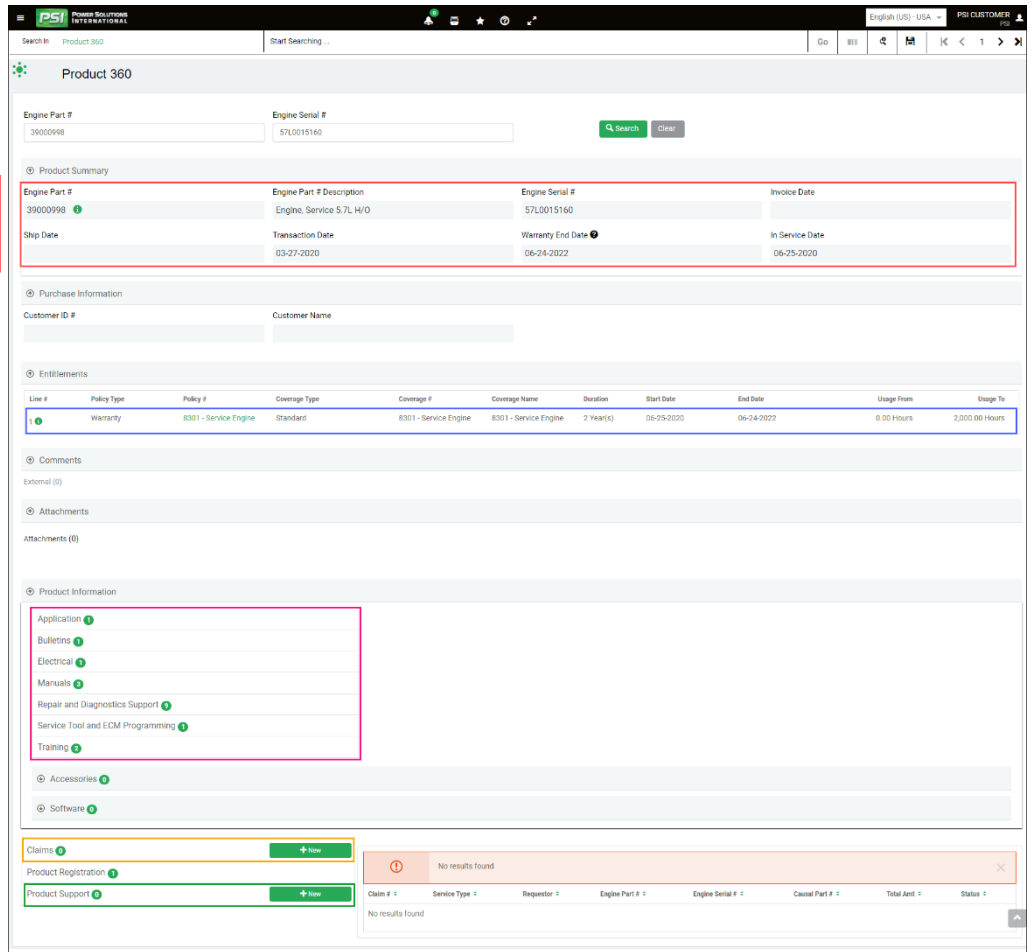
Engine Part number and name
Transaction date from PSI to your company
In-Service date (warranty start date)

Warranty Coverage Information

Knowledge objects linked to the specific engine serial number

Warranty Claim History

Product Support Case File History



The screenshot shows the 'Product 360' interface with the following sections:

- Search:** Search for Product 360.
- Product Summary:**

Engine Part #	Engine Part # Description	Engine Serial #	Invoice Date
39000990	Engine, Service 5.7L H/O	57L0015160	
Ship Date	Transaction Date	Warranty End Date	In Service Date
	03-27-2020	06-24-2022	06-25-2020
- Purchase Information:** Customer ID #, Customer Name.
- Entitlements:**

Line #	Policy Type	Policy #	Coverage Type	Coverage #	Coverage Name	Duration	Start Date	End Date	Usage From	Usage To
1	Warranty	8301 - Service Engine	Standard	8301 - Service Engine	8301 - Service Engine	2 Year(s)	06-25-2020	06-24-2022	0.00 Hours	2,000.00 Hours
- Comments:** External (0).
- Attachments:** Attachments (0).
- Product Information:**
 - Application
 - Bulletins
 - Electrical
 - Manuals
 - Repair and Diagnostics Support
 - Service Tool and ECM Programming
 - Training
- Accessories:** Accessories (0).
- Software:** Software (0).
- Claims:** Claims (0) + New
- Product Registration:** Product Registration (0) + New
- Product Support:** Product Support (0) + New



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A grayscale photograph of industrial machinery, possibly a generator or engine, with various components like pipes, valves, and a yellow cap visible. The image is semi-transparent and serves as a background for the text.

POWERING FORWARD

Powering the future of energy, transportation and industrial equipment.