

# opentext™

The Information Company™

# Desktop Messaging

Support handbook

## Introduction

### Welcome to Customer Support for Desktop Messaging

The purpose of this handbook is to provide guidelines and reference information that you will need when requiring support from OpenText. Specifically, our goal is to provide an overview of support and to help you utilize support effectively.

**Please review this handbook carefully. It contains important information regarding your OpenText support.**

## Contents

|   |           |
|---|-----------|
| <b>Maximizing your support interaction .....</b>                              | <b>4</b>  |
| How to reach a Business Network Support representative .....                  | 4         |
| How to report a problem .....   | 5         |
| How the support submission is acknowledged and assigned .....                 | 5         |
| How Support prioritizes the issues based on the priority/severity level ..... | 6         |
| How Support responds to technical questions .....                             | 7         |
| How to escalate an issue .....  | 7         |
| <b>Optimizing your internal efficiency .....</b>                              | <b>7</b>  |
| Training request .....  | 7         |
| Third party software .....  | 8         |
| IT infrastructure .....   | 8         |
| <b>Incident management .....</b>  | <b>8</b>  |
| Incident management overview .....  | 8         |
| Incident Management Process .....   | 8         |
| RCA Report .....  | 10        |
| <b>Appendix A - Escalation Contacts .....</b>                                 | <b>10</b> |

### Support pledge

OpenText's pledge is to use our years of experience in the industry to deliver services for your benefit. The people in our Technical Support Center are dedicated, experienced, and skilled professionals who aim to ensure your satisfaction each time you call or email us for support. They are eager to help you in all facets of support whether it be solving your problems or answering your questions. Their goal is to ensure you operate productively and effectively to maximize your investment in our messaging services.

### Support overview

Our support is intended to supplement your skills in the use and operation of our services. As such, you have access to support professionals for help with services specific operational issues. From our Technical Support Center, you receive the following:

- Phone and email support
- Online ticket submission
- Access to online Customer Portal (self-help)
- Account administration
- Message tracking
- Notification of system outages
- Training on service and self-help tools.
- Problem analysis and resolution

Our Technical Support Center comprises a team of individuals who work together to provide dependable and timely resolution to your inquiries. For complex problems, our team has access to the experts in our Development, IT Operations and Management teams. Therefore, you have access to the right level of our expertise when you need it.

## Maximizing your support interaction

Your technical contacts should be knowledgeable of your operating environment in order to help resolve issues. As such, they have an in depth understanding of the mail service and are comfortable with application usage enabling them to support your business processing.

### How to reach a Business Network Support representative

#### E-mail

OpenText Business Network Support can be engaged to address standard requests by e-mail, please reference the contact email addresses provided in Appendix A. It is critical that your correspondence be directed to that e-mail address, not to an individual's personally assigned address. Sending your correspondence to the correct e-mail alias ensures that your request for assistance will be handled promptly and in accordance to our policies and practices.

You will receive a response notification from OpenText Business Network Support confirming receipt of your service request. Should your issue be urgent in nature, it is strongly recommended that you contact support via phones to assist in setting the appropriate priority to your request.

Email support is available 24 x 7 x 365.

#### Phone

OpenText Business Network Support agents can be contacted through the usage of our support hotline. Please reference the contact numbers provided in Appendix A. It is critical that your call be directed to that number, not to an individual's phone number or extension. Directing your call to the correct number ensures that your request for assistance will be handled promptly and in accordance to our policies and practices.

You will receive a reference number for each call to support, which can be used for all subsequent follow up on the issue. Using your reference number will help support track your issue quickly.

Phone support is available 24 x 7 x 365.

## How to report a problem

Be sure to include the following information as appropriate when you contact us:

- Company and contact name
- Contact phone number
- Contact e-mail address
- User ID
- Submission method
- Job number or transaction IDs
- Date and time the event occurred, or data was sent, as accurately as possible
- Detailed description of the problem

Before contacting support, please take the necessary steps documented below. These steps are critical to solving problems, answering questions and addressing issues quickly. Preparing for contact with support will help ensure that the support specialist has the information required to troubleshoot the issue.

- **Define the problem:** Be as specific as possible by providing details and clearly articulating the problem.
- **Gather information:** Error messages, notifications, alerts, etc. serve as vital information in the problem solving process.

## How the support submission is acknowledged and assigned

Whether you submit your request via email or telephone, you will be assisted by a support specialist who will make every effort to respond to your request per the guidelines below. Our initial response to your inquiry might resolve your request for support or it might form the basis for more in-depth investigation. If more in-depth expertise is required, your support specialist will escalate the issue to the department or team member having the required expertise.

## How Support prioritizes the issues based on the priority/severity level

OpenText Business Network Support is an ITIL based support organization. Support request severity is determined based on the request impact and urgency. Business Network Support agents analyze the reported issue. He or she will assign a severity level based on the information provided. This severity level helps drive the prioritization of issues in our Support organization. As such, severity levels are applied with great care, so that support specialists are properly addressing the most severe cases.

**Please note that all email requests are categorized as general support inquiries, and by default set to a lower priority.**

| Severity level | Definition   | Initial response/ escalation | Target resolution |
|----------------|--|------------------------------|-------------------|
| 1              | Service impairment impacting all platforms and service applications  | < 30 minutes                 | < 2 hours         |
| 2              | Service impairment impacting multiple customers or a service interruption to a customer which may adversely affect client processes (client cannot connect to send mission critical documents or receive mission critical documents) | < 1 hour                     | < 3 hours         |
| 3              | Service impairment impacting a single platform or service application  | < 2 hours                    | < 12 hours        |
| 4              | Account service request or transaction processing inquiry  | < 24 hours                   | < 3 business days |

**Table 1. Severity levels and service level objective**

## How Support responds to technical questions

Support specialists are available to research and respond to your issues and questions. They may provide assistance by discussing the issue with you, referring you to the appropriate documentation, or helping you access the self-service section of the Customer Portal.

## How to escalate an issue

Our emphasis on achieving superior support cannot be overstated. You may request an escalation at any time. If you believe we are not honoring our policies and practices or meeting our commitments, you may ask to speak with the manager. You may also escalate your issue to the contacts provided in Appendix A.

If the manager determines that the support staff is not following policies and practices or failing to provide adequate support, the manager will ensure that the issue receives the prompt attention and proper focus.

## Optimizing your internal efficiency

To boost your staff productivity and effectiveness with our services and the Customer Portal, you need to ensure your staff has the skills and training to operate the services within your environment. The following section outlines responsibilities that will help you plan for and assign your staff's daily tasks and projects.

### Training request

Our standard training session, which is included in your setup, is a one-time session conducted over the phone. During this session a support specialist will review basic screens and functions in the Customer Portal. We encourage you to cross-train personnel to prevent any problems created by sudden staff unavailability. If you hire new staff, you are responsible for training them on how to use the Customer Portal and how to engage support.

We encourage you to use the Customer Portal whenever possible. Our staff may assist you by referring to this resource which can save you considerable time and improve your overall operations efficiency in many cases.

## Third party software

Third party software that interacts with our services is not considered part of our offering. Thus, we do not have the in-depth technical skill to diagnose third party software problems. We will refer you to those third-party software vendors for technical support when we diagnose the problem is not with our service.

## IT infrastructure

It is your responsibility to configure, monitor and maintain an IT infrastructure (computer, operating system, communications network and software, printers, integration into backend systems, etc.) that enables connectivity. An IT infrastructure is not considered part of our service offering; therefore, we do not have in-depth technical skill to diagnose IT infrastructure problems. When we diagnose the problem to be specific to your IT infrastructure, we will refer you to vendors or your IT staff for technical support. We can assist you with troubleshooting of some configuration issues by providing logs and network traces.

# Incident management

## Incident management overview

To maintain security and support mission critical processes for customers, OpenText is focused on ensuring all risk is minimized. Thus, we employ a well-defined and proven Incident Management Process that is invoked immediately when an incident causes a breach in security or a service disruption impacting multiple customers.

## Incident Management Process

The Incident Management Process includes two teams:

- Customer Notification Team
- Incident Investigation and Resolution Team

The Customer Notification Team will assess the impacted customers after a problem is encountered. A written notification is delivered to impacted customers within twenty to thirty minutes after the impact is determined.



The Incident Investigation and Resolution Team performs the following functions:

- Assess scope of problem
- Assemble subject matter experts
- Establish plan for problem resolution
- Execute plan for problem resolution

The Customer Notification Team and the Incident Investigation & Resolution Team work simultaneously and in harmony to ensure that customers are provided with periodic status updates and that the problem is resolved as quickly as possible. Upon resolution, the Post Mortem Team is engaged.

During the incident, the focus is on problem solving. Problem solving is not the same as root cause analysis. Thus, at the conclusion of an incident, we facilitate a Major Problem Review. This review involves all incident participants to assess the successes and failures of the way in which the incident was handled, identify root causes for failures and create an action plan to mitigate risks for a reoccurrence in the future.

Failure to perform a thorough analysis results in an action plan that has little to no value. As a result, we focus on performing analysis work correctly the first time. Thus, adequate time is allocated to finding the specific source(s) that created the problem. It is only through identification of the source(s) that effective action(s) can be taken to prevent recurrence of the situation.

## RCA Report

Upon completion of the Major Problem Review, a Root Cause Analysis (RCA) Report is created to provide an overview of the incident and a summary of the required actions to mitigate risks for reoccurrence. A copy of the RCA Report is available upon request. To ask for a copy, please telephone or email a support specialist with your request for the summary document.

## Appendix A - Escalation contacts

### Support contacts

The contacts provided should be called in the order listed, starting with Technical Support.

| Title                                    | Contact number   | Email address  |
|--|--|--|
| <b>Technical Support</b>                 | 1-800-209-6245, option 1<br>1-678-823-4600, option 1<br>UK: +44 203 849 4444, option 1 | <a href="mailto:desktopmessaging@opentext.com">desktopmessaging@opentext.com</a> |
| <b>Technical Support on-call manager</b> | 1-678-823-4600, option 1, then press 9   |  |
| <b>Brad Lovell, Director</b>             | (O) 1-678-823-4482<br>(C) 1-678-237-3911   | <a href="mailto:blovell@opentext.com">blovell@opentext.com</a>                   |
| <b>Steve Worthy, Senior Director</b>     | (O) 1-678-823-4449<br>(C) 1-678-371-1312   | <a href="mailto:sworthy@opentext.com">sworthy@opentext.com</a>                   |

## About OpenText

OpenText enables the digital world, creating a better way for organizations to work with information, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX), visit [opentext.com](https://www.opentext.com).

Connect with us:

[OpenText CEO Mark Barrenechea's blog](#)

[Twitter](#) | [LinkedIn](#)

**[www.opentext.com/contact](https://www.opentext.com/contact)**