CustomerCare Support Guide

November 2014

Version 2.5.5

Revision History:

v2.0 - February 2010	Niomi Wakabayashi, Edwin Scheider, Jeff Neumeister, Jon Anderson
v2.1 - March 2010	Renee ten Bruggencate
v2.2 – December 2010	Renee ten Bruggencate
V2.3 – December 2010	Niomi Wakabayashi
V2.4 – November 2011	Edwin Scheider, Niomi DeCol, Renee Gobey
V2.5 – April 2012	Erik Price
V2.5 – December 2012	Renee ten Bruggencate
V2.5 – July 2013	Edwin Scheider
V2.5.4 – October 2014	Renee ten Bruggencate
V2.5.5 – November 2014	Renee ten Bruggencate
Previous Version	Call Handling Policy 2007

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Mission Statement

Our customers recognize Vision Solutions as the leading provider of information availability solutions for businesses worldwide.

Our passion is delivering tremendous innovation and value that inspire customer confidence through outstanding solutions and people.

Support Offerings

Vision Solutions' CustomerCare offering consists of providing multi-tiered support to customers covered by a maintenance agreement. Vision Solutions' CustomerCare mission is to manage your issues in a timely and efficient manner while keeping you informed of the progress.

In some instances support is delivered by a designated business partner, who provides support based on location. This provides Vision Solutions, through its business partners, with the capability of providing Level 1 support in the national language and business hours of the customer's country. Each business partner has access to one of Vision Solutions' regional support centers. For Europe, Middle East, and Africa (EMEA), the regional support center is based in the United Kingdom. For Asia Pacific (AP), the regional support centers are in Singapore and Hong Kong. All other regions are serviced by either the Irvine - California, Rochester – Minnesota, Salt Lake City – Utah, or Indianapolis- Indiana CustomerCare centers.

Vision Solutions insists that the quality and timeliness of support services delivered by our business partners be comparable to that which Vision Solutions offers to its own customers.

In addition to support, Vision Solutions also offers a wide variety of consulting services which include but are not limited to new installations, initial implementations and product migrations. A complete listing of available services can be found at: http://www.visionsolutions.com/Services/Consulting-Services.aspx

Below is a comprehensive list of the support offerings available to our customers. The Vision Solutions Web site, http://www.visionsolutions.com/SupportCentral, is where you gain access to many of these offerings currently available from Vision Solutions. These options are available based off an active Support Maintenance Agreement.

Based on your Support Maintenance Agreement you will have access to the following options:

eSupport

eSupport is electronically delivered product information created with the objective of delivering product support in a proactive manner that's always available to our customers. eSupport is accessed online via Support Central which requires a user ID and password.

eSupport consists of several features, which is highlighted by product. Once you log on to Support Central and navigate to a product, you will find the following:

eSupport is available from Support Central, the Vision Solution's self-service Web site. Support Central plays a key role in our technical support operations, and is the very first place to go for answers, product release updates, downloads, and much more. Log in to Support Central with a user id and password to gain access to a variety of online support resources which include :

- **Quick Links** – Quick Links to Support Resources and Product Resources are offered as shortcut hyperlinks. Quick Links are located on the far right side of any eSupport page and generally provide access to resources such as Support Guides, Product Release and Life Cycle Guidelines, Recommended OS Fixes, and Self Service FAQ's.

- **Technical Support** – From the Technical Support tab, click on the **Knowledgebase** link for access to answers provided by Vision Solutions Support Specialists over years of troubleshooting and resolving issues. Click on **Open an Incident**, or **My Incidents** to submit and manage technical support requests.

- **Downloads** – The Downloads tab on Support Central contains current generally available (GA) software updates and fixes in both streamfile (.iso) and Installation Wizard formats for all supported Vision product releases. Available with the product downloads are .pdf documents that contain version release information and installation instructions.

- **Documentation** – To get Product Documentation and details on our latest releases, visit the Documentation tab on Support Central.

- **Product Notifications** – The Product Notifications tab includes Product Announcements and End-of-Life documents, as well as links to Technical Alerts and Bulletins. Product Notifications are available for download from this tab in pdf format. Product Notifications are also distributed via email to customers who subscribe to receive these electronic notifications for the products they are licensed for. Opt in to receive Product Notifications from the My Profile area on Support Central.

- **License Keys –** The License Keys tab on Support Central provides an online method to request license keys automatically or manually.

In addition to these Web-based options, eSupport includes:

- **Remote Diagnostics –** In a remote diagnostic support session, this allows us to engage with you an online remote-control support session simultaneously, conducted over the Internet in a secure session.

- **Vision Announcements** – Vision Solutions or industry events, training class schedules, and general information of interest to the Vision Solutions customer community.

Telephone Support

Telephone Support is available through multiple locations worldwide, providing local support by Support Specialists during business hours (excluding company holidays) in your geographic region. Call your regional Support Office to speak to a CustomerCare Representative.

- Telephone Support 24x7 – Telephone support is available 24x7, including for mission critical issues after business hours (evenings, weekends and holidays).

How to Contact CustomerCare

With our various response center locations, CustomerCare has the infrastructure to support global corporations with operations in multiple offices around the world.

Customers and partners may submit questions or requests for technical assistance online at Support Central, by calling a Vision Solutions' technical support telephone number, or via email.

Support Central Web Self-Service: http://www.visionsolutions.com/SupportCentral

CustomerCare Email: support@visionsolutions.com

Technical Support Telephone Numbers are -

For Product Lines:

iTERA Availability
OMS/ODS
iOptimize/Director
MIMIX RecoverNow for IBM i/Vault
Data Manager
Double-Take Share/Replicate1
Double-Take RecoverNow for AIX/EchoStream
Double-Take GeoCluster for AIX/EchoCluster

U.S. and Canada: (800) 337-8214
International (and U.S. and Canada) : +1 (949) 724-5465
EMEA : +44 (0) 333 1234555

For Product Lines:

MIMIX Availability
MIMIX Global

U.S. and Canada: (630) 282-8300
International (and U.S. and Canada) : +1 (949) 724-5465
EMEA : +44 (0) 333 1234555
Asia Pacific : +(852) 2970-3280

For Product Lines:

Double-Take Availability for Windows
Double-Take Availability for Linux
Double-Take RecoverNow for Windows
Double-Take RecoverNow for Linux
Double-Take Cloud
Double-Take Move
Double-Take Flex

U.S. and Canada: (800) 775-8674
International (and U.S. and Canada): +1 (317) 598-2066

European Union:
+44 (0)333 1234 900
+33 (0)1 47 77 15 06
+ 49 (0)89 416 126 066

Middle East (English):
+971 (0)4434 1754

Asia Pacific (English):
+1-317-598-2066

Australia:
1800 075 943

Note! We strive to respond to all requests that come in by phone and electronically in a timely and efficient manner according to our Severity Levels.

Telephone Support Menus

Vision Solutions CustomerCare Response Center
Telephone Support Menu

Option 1

iTera HA, Mimix HA, OMS/400, ODS/400

Option 1: iTera HA
Option 2: Mimix HA
Option 3: OMS/400, ODS/400
Option 0: Service Representative

Option 2

Director, Data Manager, Reorganize While Active, RecoverNow for IBM i

Option 1: Director/Data Manager/RWA
Option 2: RecoverNow for IBM i
Option 0: Service Representative

Option 3

DoubleTake Share, Replicate1, DoubleTake for Windows

Option 1: DoubleTake Share, Replicate1
Option 2: DoubleTake for Windows
Option 0: Service Representative

Option 4

DoubleTake RecoverNow for AIX, EchoSteam, DoubleTake GeoCluster for AIX or EchoCluster

Option 5

Advocate Customer or Country Partner

Support Resources

Maintaining maximum system availability and achieving timely resolution requires a working partnership between several key elements:

Technical Staff

Trained and available support team
Vision Solutions CustomerCare is committed to maintaining a high-quality team of Support Specialists that are knowledgeable about Vision products and the environments in which they are implemented. Our Support Specialists will respond to your reported Incidents, work with you to set the Severity, and take ownership of each Incident until a resolution can be achieved and the Incident can be closed.

Trained and available system administrators
System Administrators may be end-user Customers or Partner technical staff. In order to efficiently use the support services offered by CustomerCare, customers and partners need to ensure that their system administrators as well as their technical staff are trained on the software and systems they are maintaining. While an Incident is being diagnosed we rely on the system administrators to be readily available to our CustomerCare Support Specialist in order to provide additional information and to implement solutions when necessary. This is crucial in problem resolution.

Diagnostic Tools

Remote Diagnostics

It is important that system administrators and Support Specialists have full access to the systems to gather all necessary data and perform diagnostic and corrective procedures. One way that our Support Specialists can do this is by requesting a remote diagnostic support session. It allows us to engage with you in an online remote-control support session simultaneously, conducted over the Internet in a secure session. Our Support Specialist can then see your system and work with you to resolve the issue. You see everything that the Support Specialist does while you retain primary mouse and keyboard control. This is a permission-based system where you control how much access is given. The issue gets resolved and you get hands-on training.

Test Systems

CustomerCare is committed to maintaining test systems with the latest hardware, operating systems and product release levels in an attempt to simulate a customers' environment. This gives our support team the environments to attempt to reproduce issues in-house which reduces time spent on problem resolution.

Customer Relationship Management (CRM)

Vision CustomerCare utilizes an online customer relationship management system called 'RightNow', to manage all customer reported Incidents. By using an online CRM we are able to easily manage questions and issues by assigning a unique call number to every reported Incident. In addition, we are able to cross manage Incidents from any regional support office in the world, thus allowing a critical Incident to "follow the sun" around our global support locations until resolution.

PartnerWorld®

As a Premier member of IBM's PartnerWorld for Developers program, Vision CustomerCare has direct access to IBM's iSeries technical resources. They assist us in problem determination whenever it appears that the operating system may be contributing to an issue.

The Product Support Solution

The section below defines and describes the policies and procedures through which Vision Solutions CustomerCare implements its real time and call back offerings.

The key to a successful system implementation is the partnership between the system administration staff at the customer site and the Vision Solutions support team. Vision Solutions CustomerCare takes ownership of each Incident until it has been resolved and closed.

The section below details the process CustomerCare has implemented to resolve Incidents and to strengthen the partnership with our customers.

Support Assistance

Start with Support Central

When faced with a question pertaining to the functionality of your software solution or when confronting a potential product error, the first step is for the Customer System Administrator or Partner Technical Staff to go to the Vision Support Central site:

http://www.visionsolutions.com/SupportCentral

From a web browser you can access an extensive solution database designed to support your Vision products. Answers to questions on product configuration or usage can be obtained using our search tool, providing the ability to search FAQs, Technical Alerts, and product manuals. If a solution cannot be found in the online knowledgebase, your next step is to gather the pertinent information and open a new incident.

Creating a New Incident

Gather product information

In order for CustomerCare to respond most effectively to your request, please be prepared to provide the necessary information needed for the Support Specialist to diagnose the problem, including:

Product Information	This includes product in which you are running, Release Level, Service Pack level and serial numbers when appropriate.
System Environment Information	This includes the Operating System release levels for each system involved.
Pertinent Information	This includes the job name, screen etc. that is experiencing the issue. Always provide any errors that are received. The most critical piece of information will always be a job log, and more often than not requested. Also include any additional information that you can provide to help diagnose the issue.

Determine the severity level

CustomerCare will work with you to determine the severity level of your issue using the guidelines below.

Severity Level Definitions and Response Times

Severity Level	Definition	Phone Target Response Times	Electronic Target Response Times
1	Production system and/or Vision product down. Unable to perform an essential daily business function	30 Minutes	For a Severity 1 issue (i.e. your system is down or severely compromised), please Call the CustomerCare Response Center for prompt assistance.
2	Target system and/or Vision product down that has critical impact to business operations. Problem related to functions not available or coexistence with an environment that has significant impact on normal operations and/or data integrity. No workaround is available.	1 Business Hour	4 Business Hours
3	Problem related to functions not available. Performances that have significant impact on the normal operations, without affecting data integrity. Workaround may be available.	8 Business Hours	8 Business Hours
4	No/low impact on the performance or function of the product. Such as an enhancement or cosmetic change	1 Business Day	1 Business Day
7	Reserved for Services personnel with critical issue impacting project or training in progress with a customer. Incident can be opened by Vision employee or by partner.	30 Minutes	For a Severity 7 issue please Call the CustomerCare Response Center for prompt assistance.

(Business Hours apply to the Response Center in your local time zone.)*

Report Issue

Vision provides several methods to report a new issue. Please note that regardless of which method is used, entitlements (verification of a current maintenance agreement) is always verified at the beginning of any reported issue. If the Customer is not entitled (no current maintenance agreement) then customer will be referred to the CustomerCare Business Services team for resolution and support will be suspended until further notice.

If reporting an issue by…

Method	Definition
Telephone	When a call is placed by phone, the phone system will automatically transfer the customer to the most qualified Support Specialist specializing in the product pre-selected by the customer. At all times, the customer may also choose to be transferred to a Service Representative by pressing '0'. When the call is accepted, an Incident is opened by the Support Specialist and the Severity Level is assigned, as collaborative between the Customer\Partner and the Support Specialist. The issue then begins investigation through to resolution. If all Support Specialists are busy, then the call will be routed to a Service Representative. The Service Representative will log the issue into an Incident, and set the Severity Level with the customer. Once the Severity Level is set, the Response Times are in effect. Please note that our Support Specialists make every effort to respond right away in an attempt to avoid reaching the maximum response time.
Electronic	All electronic submitted requests are managed during business hours of the local Response Center. For an issue reported via Support Central, a form is provided for the customer to specify the severity along with other pertinent information. Once the issue is submitted by the Customer\Partner, the Incident is automatically created and the Customer\Partner will receive an auto-generated email notification with the Incident number which confirms that the issue has been successfully created. Once the issue is created, it is available for a Support Specialist to retrieve and start investigation. For an issue reported via email, the system will attempt to auto-recognize the customer contact and associate it with the correct company and products licensed. If the contact and company are automatically resolved, the email is created into an Incident. The Incident is placed into queue for a Support Specialist to retrieve. Once the Incident is successfully created, an automated email is sent back to the customer with the Incident Number. (All calls logged using this method are initially assigned a Severity 3, as there is no way for the system to automatically determine Severity Level by email.) Once the Incident is retrieved by a Support Specialist, the customer is contacted, Severity is confirmed and investigation is started. (If the customer cannot be auto-recognized by our system, one of our available Support Representatives will investigate, resolve and ensure the Incident is successfully reported.)

Incident Resolution Process

Resolution Stages

Once the Incident has been opened, the investigation and resolution process begin. In the resolution process, three important stages are defined:

Diagnosis	This is the diagnosis, in which the issue and method to resolve have been identified in order to bring the system/feature to an operational state.
System/Feature Operation	The necessary procedure has been executed in such a way that the system/feature can be used in production.
System Stable	The necessary procedure has been executed and the issue no longer occurs.

Resolution Escalation Process

Most Incidents proceed through the resolution stages (Problem Diagnosis, System Operational, System Stable) in an efficient and timely manner. However, there may be circumstances that require an escalation. Customer problems may occur for which the resolution process is more complex than normal and requires more extensive research and resources.

The first step in the escalation process is for the Support Specialist to contact their assigned Support Specialist Escalation. All Support Specialists are teamed up with their peers, to act as escalation contacts. This method not only ensures that everyone works together; and also that each team has all levels of expertise to help and assist with problem diagnosis.
Once the Support Specialist has contacted the team members in their escalation path, coordination is done to get both Support Specialists involved. All Incidents remain managed and handled according to the Severity of the issue. Once the Support Specialist Escalation has been involved, and efforts have been exhausted the escalation process is taken to the next level.

The next level in the escalation process, is utilizing the Development team. Once it is determined that Development needs to get involved, the Support Specialist will trigger internal procedures to request the Development team for assistance. This method is also coordinated and the Incident remains managed according to the Severity of the issue.
In some situations, and at any time in the escalation process, it may be required to contact a 3rd party to assist with resolution. As example, this may include Microsoft, IBM Support and\or the customers' network administrator, depending on the issue. During these times, the Support Specialist will offer to remain involved, in order to continue an attempt to resolve the issue.

Please note that CustomerCare is unable to open any issues with any other 3rd party vendor, such as PMR's with IBM or Microsoft on behalf of the customer. We are however more than willing to stay on the phone when the call is made to the 3rd party vendor to continue assisting if that is preferred.

Incident Resolution

An Incident is resolved once the appropriate action has been taken to bring the system/feature to an operational state and it is verified that the system is stable. Resolution may include several resolution methods, as noted below. Regardless of the actual resolution a CustomerCare Support Specialist will stay involved every step of the way until the issue is resolved and closed.

Common Resolutions…

Common Resolution Method	Steps Involved
Configuration	Upon investigation of the Incident, it may be recommended and\or required to make software or system configuration changes in order to resolve the issue. Any changes that need to be made to the environment are always provided to the Customer\Partner first in order to discuss. The Customer\Partner should make the changes unless otherwise requested.
Defects	The following process is used in the event that a Defect is identified and needed for complete resolution. a. *Workaround.* The first step to resolution is for the Support Specialist to offer a feasible workaround to the Customer\Partner. b. *Fix.* - If the issue is not of urgent nature and\or a feasible workaround has been provided, the Defect is then submitted to our development team for inclusion into a Service Pack. The workaround remains in place until the Defect is included in a Service Pack. Milestones and Release Dates are communicated by the Support Specialist throughout the handling of the Incident. - If the issue is urgent and a feasible workaround is not available, the Support Specialist will escalate (or re-escalate) the issue to both Development and CustomerCare Management for further intervention on a resolution, which may result in an emergency patch prior to inclusion in a Service Pack.
Enhancements	If the resolution is determined to be an enhancement to the product, the request will be routed to our Product Management team for consideration into a future release of the product. You may also log any enhancement requests online via Support Central athttp://www.visionsolutions.com/SupportCentral
Product Upgrades	In some cases, it may be required for the Customer\Partner to perform extensive updates to your product, if: — The product level has not been kept current by the Customer\Partner, and bringing the environment current on the latest Service Pack is needed in order to reach resolution. — The product is running an older release of the product than what is currently supported by Vision Solutions. Please refer to the last

	section of this document, under “Additional Guidelines,” for ‘Supportability.’
3rd Party Fixes	In rare cases, it may be required to obtain a fix from a 3rd party vendor in order to resolve the issue. The Support Specialist will assist the Customer\Partner as much as possible when working with a 3rd Party Vendor.

Incident Closure

Incidents are closed after the issue has been resolved and the Customer\Partner agrees that the Incident can be closed. In some cases, if the Support Specialist has not been able to make contact with the Customer\Partner, on the third attempt the Customer\Partner is notified via email that the Incident has been closed.

Re-Opening Incidents

In the event that an issue needs to be re-opened, reply to the Incident email with the details or call your local Response Center and then the Incident will be re-opened.

Incident Escalation Process

! Please Note

The Incident Escalation Process deals with exceptions that are not caused by a failure in the normal call handling process. Escalations about such failures should be addressed and handled by a CustomerCare Manager/Supervisor. Please see “Management Contact Information,” in the next section “Additional Guidelines.” The Incident Escalation Process assumes that an Incident has been opened. If this is not the case, the Incident must be opened prior to the escalation.

Independent of the quality of the available support processes, there may be circumstances in which the normal processes are not sufficient to allow the customer to meet all his/her business requirements. CustomerCare has recognized this and has implemented a management escalation procedure that allows the appropriate staff to address such cases. This procedure explains the systems and processes that have been put in place to allow the customer to escalate an urgent need. The procedure further explains how Vision Solutions will proactively act to remove the urgency and allow the customer to meet business requirements.

The aim of the management escalation process is to allow the customer to satisfy his/her business requirements. The escalation process is therefore considered complete once these requirements can be met. While it implies that a permanent solution to the problem has been implemented and verified, it may also consist of incorporating an alternate solution or workaround in place until a permanent resolution is available.

When an Incident is opened, the customer is informed of the normal process steps that will be taken to resolve the problem. It may become apparent at this point that the normal resolution process may not allow the customer to satisfy his/her business requirements. If the risk for significant negative impact on the customer's operations is high, the customer should immediately request escalation.

The customer's request will be brought to a CustomerCare Manager/Supervisor who will validate the escalation request. Part of the validation check is to ensure that the information required to elevate the severity of the Incident is available. Since the aim of the escalation is to allow the customer to meet his/her business requirements, the information provided must also contain details on what these requirements are and what is minimally needed to meet them. This is the Escalation Objective.

As soon as this information is available, the CustomerCare Manager/Supervisor triggers the escalation process by calling, paging or emailing the appropriate CustomerCare Escalation Manager and forwarding all the necessary information.

The Escalation Manager evaluates available information and establishes the Vision Solutions escalation team. The Vision Solutions escalation team may include (but is not limited to):

- Vision Solutions CustomerCare
- Customer Technical and Management representatives
- Vision Solutions Development
- Vision Solutions Consulting Services

Steps taken in achieving escalation objective may include:

1. Requesting the immediate assistance of an engineering and/or development engineer in the diagnostic process.
2. Requesting the assistance of other departments (such as Development, Consulting Services) to define and implement an acceptable alternate solution.

As soon as the action plan is defined, the Vision Solutions escalation team will distribute this information to the customer and Vision Solutions internally. At this point, the CustomerCare Management team, including the Sr. Vice President is notified of the escalation. This ensures that Vision Solutions senior and executive management is aware of the escalation so they can support the allocation of needed resources. Throughout the execution of the plan, the Escalation Manager will keep the customer informed on a regular basis of the progress made via e-mail, conference calls, direct communication or all of the above.

The escalation process is complete once the problem has been resolved or an acceptable alternate solution has been implemented that allows the customer to meet his/her requirements. The original Incident from which the escalation originated remains open until the issue is resolved.

Additional Guidelines

Management Contact Information

Your CustomerCare Management team is available 24x7. For questions, issues, escalations or anything that is needed, please contact any one of the following:

Windows
Albert Aguirre
Manager, CustomerCare – Indianapolis, IN
Direct: (317) 813-1472
albert.aguirre@visionsolutions.com

Todd Yoder
Manager, CustomerCare – Indianapolis, IN
Direct: (317) 579-1010
todd.yoder@visionsoutions.com

Bret O'Brien
Sr. Manager, CustomerCare – Indianapolis, IN
Direct: (317) 572-1838
bret.obrien@visionsolutions.com

Erik Price
Director, CustomerCare – Indianapolis, IN
Direct: (317) 572-1837
erik.price@visionsolutions.com

Rob Martin
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Direct: +44 (0) 1905 72 8031
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Director, CustomerCare EMEA – Worcester, UK
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Power I-Series
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Niomi Snedden
Sr. Manager, CustomerCare – Salt Lake City, UT
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Direct: (507) 529-2171
jon.anderson@visionsolutions.com

Desmond Lam
Manager, CustomerCare APAC
Direct: +852-9196-0186
dlam@visionsolutions.com

Edwin Scheider
Sr. Manager, CustomerCare EMEA – Manchester, UK
Direct: +44 (0) 1905 728080
Edwin.scheider@visionsolutions.com

Jeff Neumeister
Director, CustomerCare – Irvine, CA
Direct: (949) 660-7455
jneumeister@visionsolutions.com

Pete Robie
Sr. VP, CustomerCare – Irvine, CA
Direct: (949) 660-7453
probie@visionsolutions.com

After Business Hours

Access to a CustomerCare Manager is available 24x7. To reach the scheduled CustomerCare Manager after business hours please dial our main CustomerCare Support Line, and request to speak with the Vision Solutions CustomerCare Escalation Manager.

Supportability

In some cases, it is necessary and required for the Customer\Partner to take action in order for CustomerCare to provide further support. Some of those situations may include:

Expired Maintenance

Please note that regardless of which method is used to report a new issue, support entitlement (verification of a current maintenance agreement) is always verified at the beginning of any reported issue. If the Customer is not entitled to support (no current maintenance agreement) the caller's request is referred to the CustomerCare Business Services team for resolution and support will be suspended until further notice.

Upgrade Notices

Upgrade notices are sent out to our customer base in advance of 'ending support for a particular version. The announcement serves as an adequate time notice for customers to plan and prepare for an upgrade. If you are running a version of the product that has been issued an upgrade notice, CustomerCare will continue to provide support on a best effort basis. However, no further Development code fixes are provided. We encourage all customers to run on a current version of the product.