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Clearswift Support

Using the Clearswift Support Portal

Version 2.1

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Contents

1 Introduction

This document explains how you can use the Clearswift Support Portal to:

- Search for a solution in our knowledgebase
- Ask us a question
- Report a problem
- View your existing cases
- Download software/updates
- Access product documentation
- Request a feature enhancement
- Review your service contracts

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2 Logging In

Clearswift provides separate Support Portals for our clients and partners. Both can be accessed by browsing to: http://www.clearswift.com/support/portals

Support Portals

Support area for existing and evaluating customers and partners. Login for access to documentation, patches & updates, and tools and utilities.

\+ Client Support Portal

\+ Partner Support Portal

\+ Portal Account Registration

3 Homepage

The homepage of the portal provides you with immediate access to all the most frequently required functions and information, including;

- Recently viewed items

- Hot support topics

- Case management

- Product and documentation downloads

- End of Life Statements

4 Searching for a Solution

The support portal allows you to search for solutions to common questions and issues.

To search for a solution:

1. Click on the **Solutions** tab.
2. Enter the key words related to your inquiry into the **Search for** field.
3. You can use the **in** drop down list to refine your search by selecting the appropriate product.
4. Click on the **Find Solution** button to initiate your search.
5. A list of solutions matching your inquiry will be displayed in order of relevance.
6. Select the title of a solution in order to view it.
7. If the solution answers your question, click on the **Yes** button.
8. If the solution did not help you answer your question, click on the **No** button.

5 Raising a Case

If you cannot find a solution that answers your question, or resolves your problem, you can submit a case to our customer support team. You can use cases to:

- Ask us a question
- Report a problem
- Request a feature enhancement

To raise a case:

1. Click on the **Cases** tab.
2. Click on the **Create New Case** button.
3. Use the **Record Type of new record** drop down list to select the appropriate type of case, see Appendix A – Case Types for a description of these:
   a. **Problem Report** - An error in the use/function of the software or system.
   b. **Technical Query** - A question relating to specific software or system use/functionality, or general enquiry related to Clearswift products.
   c. **Enhancement Request** – A request for enhanced or additional functionality to Clearswift products.
   d. **Hardware Incident** - A request related to a back-to-back hardware support contract.
   e. **URL Categorisation** – A request for a classification review to be carried out on a specific URL.
4. Click on the **Continue** button.

5. The Status of the case will automatically be set to **New**. Appendix B – Case Status Descriptions contains definitions for each case status.
6. Use the Product Family drop down list to select the appropriate product that you wish to raise the case for example:
   a. SMTP – Use this for issues relating to MIMEsweeper for SMTP
   b. Email – Use this for issues relating to the Clearswift SECURE Email Gateway.
7. The case severity, see Appendix C – Incident Severity for further details, is determined by both the **Impact** and **Urgency** of the issue. Use the **Impact** drop down list to select the number of users within your organisation that the issue is affecting:
   a. Single User
   b. Multiple User
   c. Organisation
8. Use the **Urgency** drop down list to select the importance of the issue:
   a. Low
   b. Medium
   c. High
9. Enter a brief summary of the problem in the **Subject** field.
10. Enter a detailed description of your issue into the **Description** field.
11. Click on the **Submit** button.

12. You will automatically receive an email letting you know that your case has been logged. Any replies to this email will be automatically added to your case.
13. The support portal may suggest some potential solutions to your case. You can view a possible fix by clicking on the associated link.
14. You can add further comments using the **Add Comment** button and if required you can attach any files to the case (e.g. log files), click on the **Upload Attachment** button and follow the instructions to do this.

6 Reviewing Cases

You can also use the Cases tab to view existing cases and review:

- Responses to questions that you have asked

- Progress of any problems that you have reported

- Status of your enhancement requests

You will also be able to view any cases raised by your colleagues.

To view the status of a case:

1. Click on the **Cases** tab.
2. Use the **View** drop down list to select the cases that you wish to view:
   a. My Open Cases – Open cases that you have raised.
   b. My Resolved and Open Cases – All of your open and resolved cases.
   c. Organisation's Open Cases – Open cases that you/your colleagues have raised.
   d. Organisation's Resolved and Open Cases – All of the open and resolved cases for your organisation.
   e. Recently Viewed Cases – Cases that you have recently viewed.
3. Click on the **Go!** Button.
4. Select the appropriate case from the list.
   a. The **Status** field indicates the stage that the case is currently at and if we are awaiting input from someone within your organisation. You can see a full description of each status in Appendix B – Case Status Descriptions of this document.
   b. The **Case Comments** section displays all of the notes associated with the case and is your primary means of exchanging information with the Clearswift support engineer(s).
   c. The **Solutions** section displays potential resolutions that have been suggested by the Clearswift support engineer(s).
   d. The **Attachments** section is used to exchange files (e.g. log files) with the Clearswift support engineer(s).
5. To add a comment to the case click on the **Add Comment** button.
6. Enter the relevant information into the **Comment** field.
7. Click on the **Save** button.
8. If a solution has been suggested to you by the Clearswift support engineer(s), you can view it by clicking on the appropriate link in the Solutions section.
9. Alternatively, you can search for a solution yourself:
10. Click on the **View Suggested Solutions** button to see the top 10 suggested solutions.
11. Enter specific terms that you wish the search for and then click on the **Find Solution** button.
12. If you feel that the case has been appropriately resolved, click on the **Close Case** button.

7 Downloading Software

You can download the latest version(s) of your product(s) and any utilities from the relevant product tabs.

To download software/updates:

1. Click on the relevant product tab (e.g. Web Gateway).
2. Scroll to the appropriate **Gold Image** and click on the **Download** link.
3. You can also view the appropriate release information by clicking on the **Read Me** link.

8 Accessing Documentation

You can access the latest documentation relating to your product(s) from the relevant product tabs.

To download documentation:

1. Click on the relevant product tab (e.g. Web Gateway).
2. Scroll to the **Documentation Section** and click the relevant document link.

Documentation Section

Getting Started Guide

Installation Guide

Setup & Configuration

SECURE Web Gateway Help

9 Summary

That completes this guide on using the Clearswift support portal. If you have any questions, or feedback, please feel free to contact us.

- Support Portal: http://www.clearswift.com/support/portals
- Email: support@clearswift.com

- Telephone:
  - Europe, the Middle East and Africa: +44 118 9038200
  - Asia and Pacific Regions: +61 2 9424 1210
  - Germany: 0800 1800 556
  - Japan: +66 33 812 501
  - Americas (North, South and Canada): +1 856 359 2170

Appendix A – Case Types

Case Type	Description
Enhancement Request	A request for enhanced or additional functionality to Clearswift products.
Hardware Incident	A request related to a back-to-back hardware support contract.
Problem Report	An error in the use/function of the software or system.
Technical Query	A question relating to specific software or system use/functionality, or general enquiry related to Clearswift products.
URL Categorisation	A request for a classification review to be carried out on a specific URL.

Appendix B – Case Status Descriptions

Status	Purpose
New	The Incident is currently queued with a 1st line support agent, awaiting response.
Under Analysis L1	The Incident has been responded to and is currently being worked by the L1 Support tier.
Under Analysis L2	The Incident has been escalated to L2 Subject Matter Expert for troubleshooting and root cause analysis.
Under Analysis L3	The Incident has been Escalated to the L3 Engineering Response Team (ERT) for consultation.
Under Analysis 3rd party	The Incident has been escalated to a third party for back-to-back support for integrated components.
Hot Fix Escalated	A Critical/High Severity Problem Report is escalated, with an associated SCR to be resolved through delivery of an emergency patch.
Contact Input Received	The Technical Contact has updated the case via web comment or email.
NOTE: SLA reporting excludes all time under the following status values	
Awaiting Customer	The action is on the Customer to respond to the request that has been made. This may be to provide additional information. The Customer is notified via email of any Incident that has been changed to this action.
Awaiting Solution Confirmation	An answer/solution has been provided, waiting for Customer verification of resolution.
Awaiting HF Confirmation	Hot Fix was delivered, waiting for verification of resolution.
Awaiting Patch Confirmation	Software Update delivered, waiting for verification of resolution.
Awaiting Future Handling	Incident handling is deferred, the customer agrees to suspend the SLA clock and postpone the request.
Awaiting 3rd Party	The Incident is escalated to a 3rd party with no back-to-back SLA in place.
Awaiting PR Review	A Major/Minor Severity Problem Report has been raised with ERT pending review.
Awaiting ER Review	An Enhancement Request has been raised with Product Management pending review.
Awaiting Patch	Problem resolution is targeted for a scheduled maintenance release.
Awaiting Work Request	Problem resolution is dependent upon a service engagement which needs to be scheduled under standard consulting service process.
Awaiting Scheduled Maintenance	The Incident will be resolved through planned maintenance.
Closed	The Incident is closed.

Appendix C – Incident Severity

Severity	Description
1 Critical	System functionality is completely unavailable or inaccessible. The situation requires immediate attention. Example scenarios: • All services unavailable on a single platform - total loss of service • Services unavailable to a multitude of platforms • Suspected security breach
2 High	System functionality is severely limited, resulting in the prevention of key operations. With no available workaround, the situation requires urgent attention. Example scenarios: • Single service unavailable • Loss of platform/network resilience • Backup failure • Significant degradation of service/performance
3 Major	The system is impaired, a single function is impacted but key business processes are not interrupted. Example scenarios: • Minor degradation of system performance • Single user fault
4 Minor	The problem causes minimal operational or business impact, a general technical question or enhancement request. Example scenarios: • Minor issue with no impact to service • Documentation error • Technical/product query • Enhancement request