PURECONNECT Dedicated Support Services Customer Guide

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Welcome

The Genesys Dedicated Support Services Organization is designed to manage and maintain your mission critical PureConnect System - allowing you to remain focused on your core business.

World-Class Contact Center

Ensuring innovative operations and continuous improvement throughout our own contact center is a constant focus. And like the customer organizations and partners we support, leveraging the PureConnect platform's multi-channel software technology makes ours a world-class PureConnect to manage your support issues.

Global Availability

Dedicated Support Services is a true worldwide organization equipped to support your business wherever it's located, including multi-site branch offices and international locations. Our Support Centers actively serve Genesys customers in more than 100 countries

Getting Started

A Regional Support Manager will be assigned to your organization based on your geographical location. The Regional Manager will schedule a kick-off call with your organization prior to going live with Dedicated Support Services. This call is designed to cover the following areas:

- Introductions – discuss Dedicated Support Services/Support organizational structure & roles
    - Regional Support Manager (RM)
    - Account Engineer
    - Technical Account Manager
- Review scope of service and ownership of system components
- Remote monitoring
- Remote access
- Review Support normal business hours and emergency availability (24/7/365)
- Review case severity levels definitions
- Review engagement process
- Discuss which customer contacts are authorized to open support case
- Discuss which customer contacts are authorized to submit Moves, Adds, and Changes (MACs)
- Review process for how to request a MAC
- Ongoing communication plan/expectations
- Discuss escalation procedures/path
- Discuss ongoing system maintenance/management requirements
    - Discuss maintenance activities – Releases and Patches

    - Discuss Software Change Request (SCR) process
- Customer information
    - Verify customer emergency contacts (e.g. who does Dedicated Support Services contact if we receive a remote monitoring alert)
    - Verify customer's hours of operation and maintenance window availability
    - Discuss and document any customer change control/approval process
        - Discuss customer best practices

Hours of Operation

Support during Normal Business Hours

Dedicated Support Services is fully staffed Monday – Friday 7am – 9pm Eastern Standard Time (excluding Holidays) for emergency issues, normal service needs such as Move, Add, Changes (MAC), application issues and end-user issues.

Support during Non-Business Hours

Emergency Support is available 24/7/365 for service impacting issues only (i.e. Prod Down outage situations). Please see the ***Case Severity Definitions*** for details on what constitutes a Code Red. Please review this definition carefully. All other issues during non-business hours should be submitted via web. A Dedicated Support Services Support response should be returned during the next business day.

During some, or all non-business hours in your region, emergency support calls may roll to Dedicated Support Services after-hours support. This team is comprised of a rotating selection of those who work within the Dedicated Support Services team.

How to Contact Dedicated Support Services

For technical issues or to request a Move, Add, or Change (MAC) you can call Dedicated Support Services or submit a Case online. High Priority or Code Red (Emergency) Cases must be opened via phone.

Phone

Step 1: Call 1-866-794-3423 or 1-317-715-8686

Step 2: Enter your PIN number. (If you do not have a PIN number or need to have it resent, please contact Support.CustomerCare@genesys.com or call your Technical Account Manager.)

Web

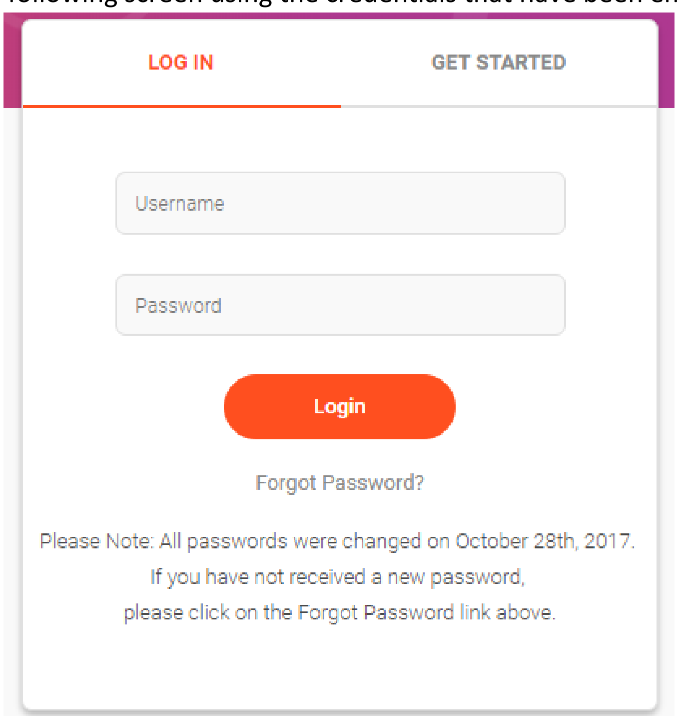
Step 1: Go to https://genesyspartner.force.com/customercare/CustomerCareContactUs

Step 2: Enter your username & password. If you do not have a User Name or Password or need to have it resent, please contact Support.CustomerCare@genesys.com or call your Technical Account Manager. For information on opening a new Case on the web, viewing Cases on the web or directly navigating to a Case on the web please read below.

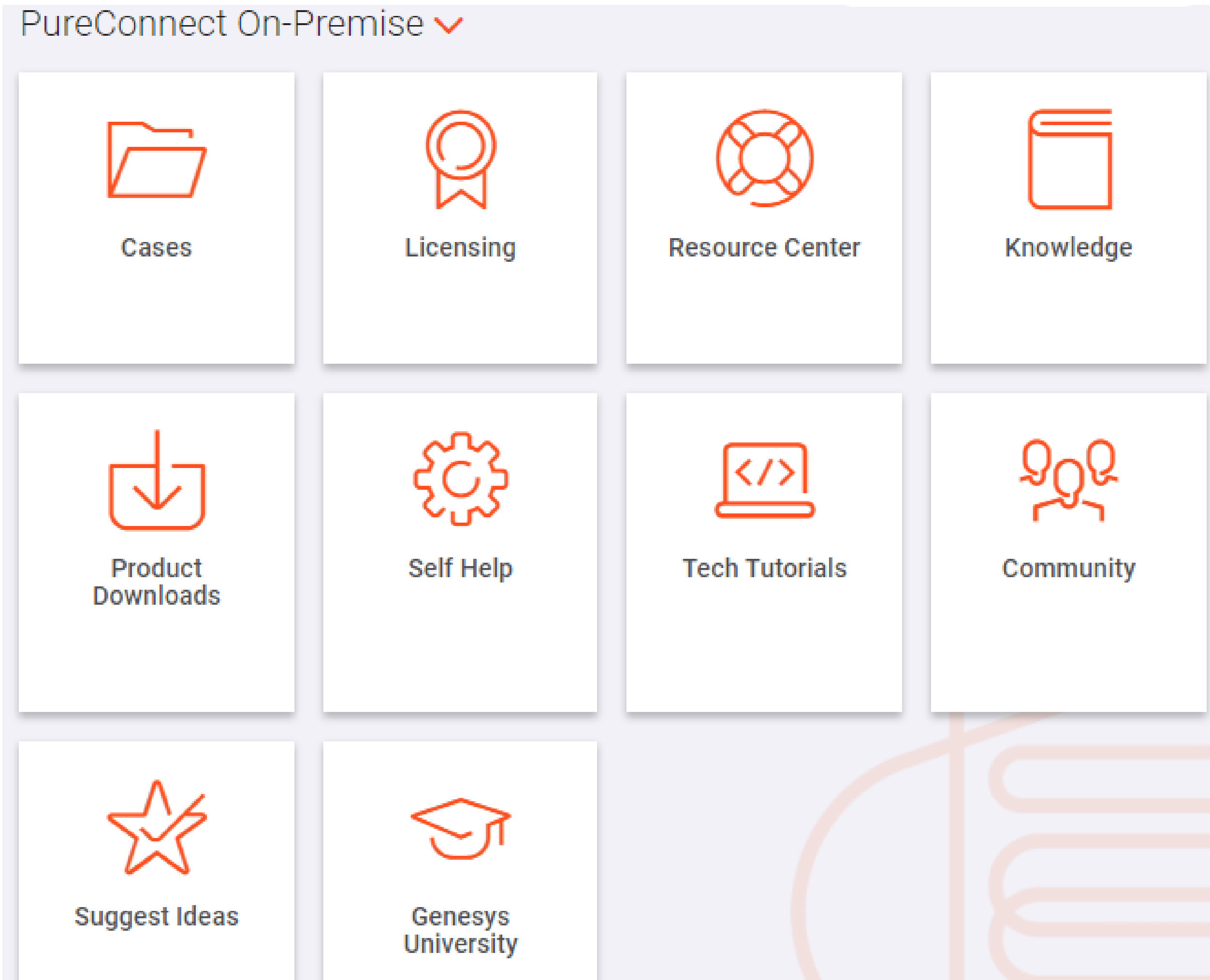
Opening a new web Case

Navigate to https://genesyspartner.force.com/customercare/

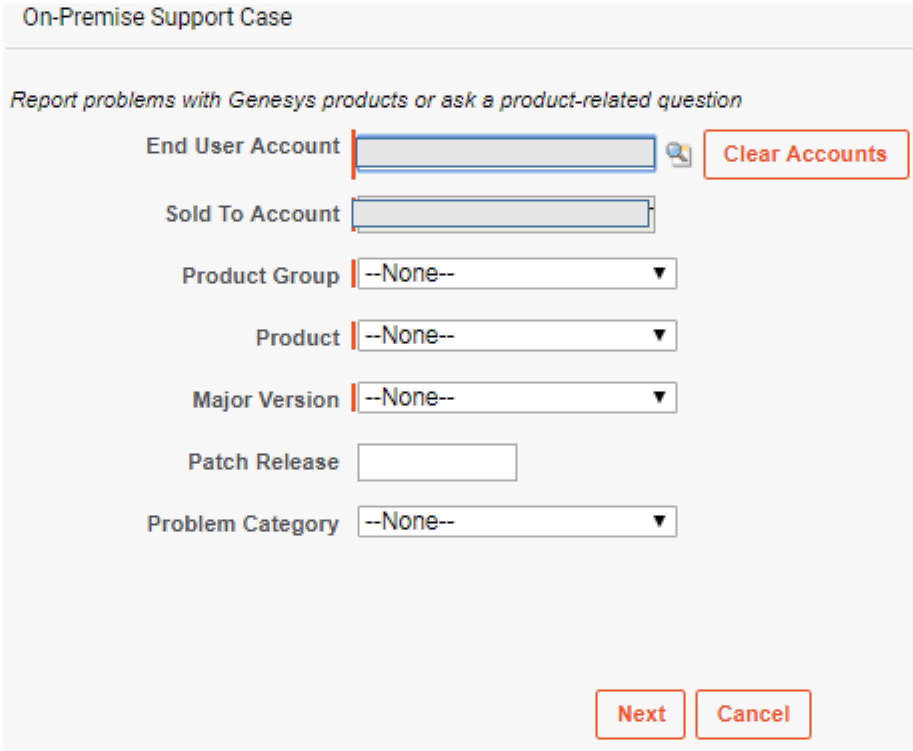
- Log on to the following screen using the credentials that have been emailed to you.



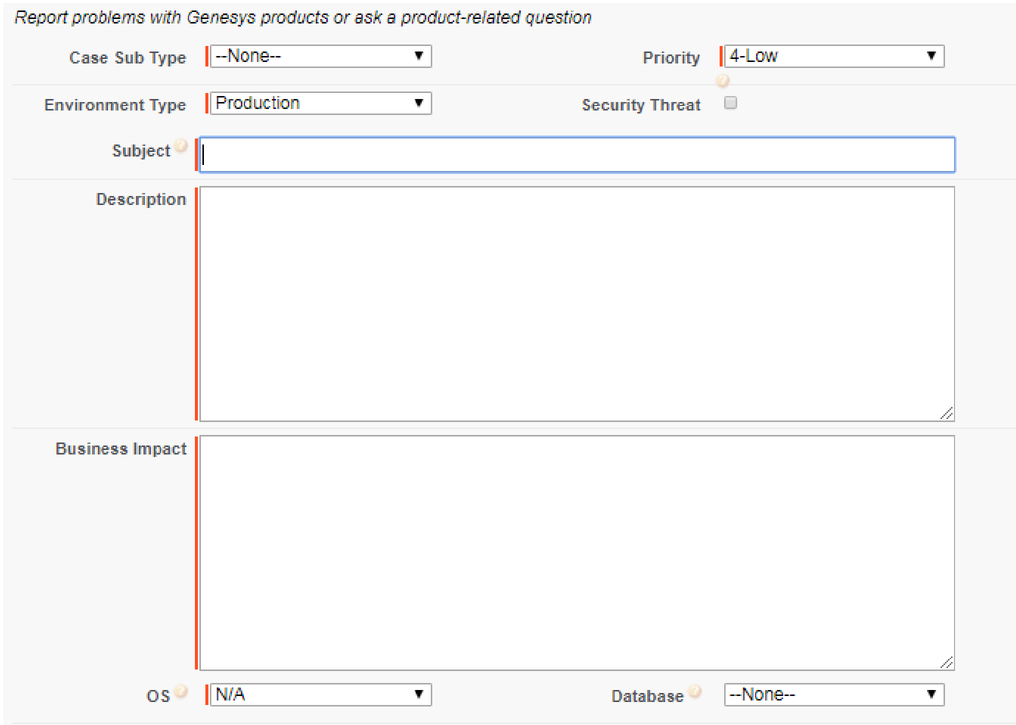
- Once logged in, you should see this screen



- To open a new incident, under ***Cases***, select the Open a Support Case or Open a Service Request for a MAC case
- Fill in the appropriate product group and product that the issue is in as well as major version



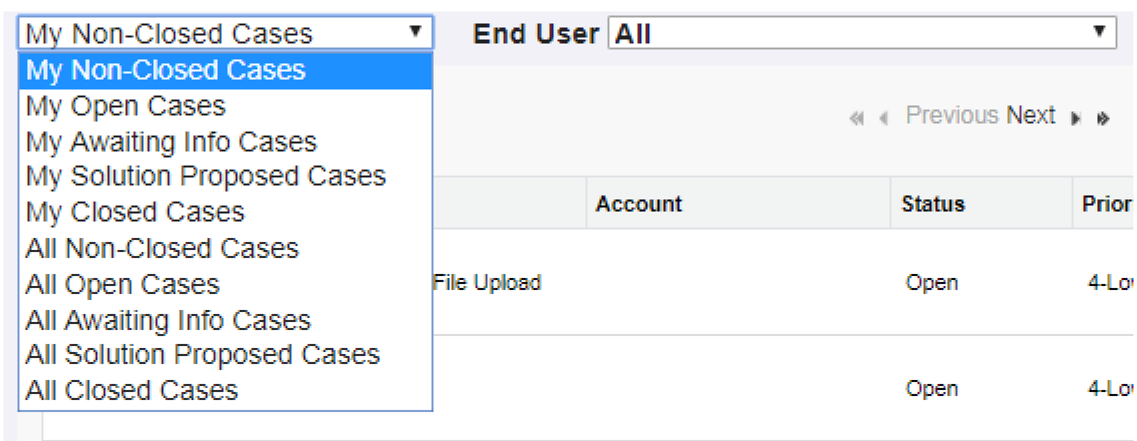
- Fill in the required information for the issue you are experiencing.
    - Case sub type: Problem or Inquiry
    - Environment Type: What environment the issue exists in (dev or prod)
    - Priority: Choose priority of case. Automatically defaults to low
    - Subject: Brief description of problem
    - Description of Issue: Be as descriptive as possible including if there were any recent changes
    - Business Impact: i.e. number of agents/calls affected
    - OS: OS level of server/workstation experiencing issue



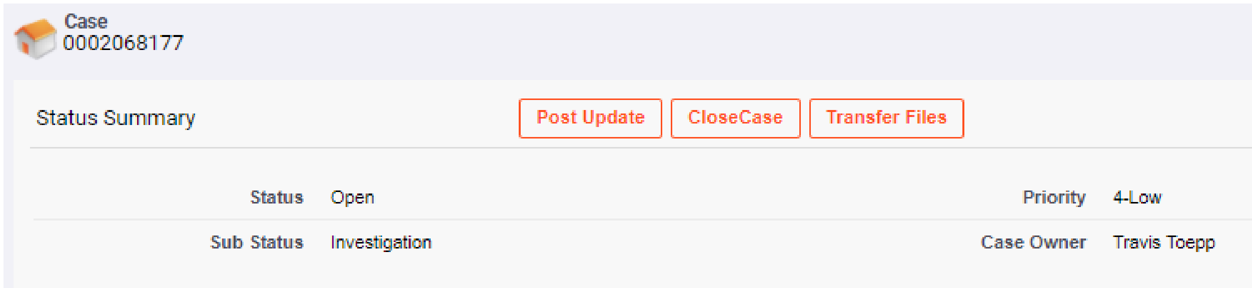
- Press the Save button

Viewing/Managing Cases

- Navigate to https://genesyspartner.force.com/customercare/
- Log on to the My Support Portal using the credentials that have been emailed to you.
- Navigate to Cases -> View/Manage Cases. Choose which case view you want to use.



- From here you can choose the specific case you want to update/view
- Once in a case, you can choose to update, close, or upload files



Transfer Files to/from Case

Genesys provides a file transfer tool on My Support to allow customers to upload logs and other files that may be needed to help resolve Cases. Clicking the Transfer Files button within any non-closed Case launches the browser-based File Transfer Client, which provides the following features:

- Secured data transfer over HTTPS
- Sending multiple files concurrently
- File transfer resume capability
- Integrity validation
- No file size limit

Browser Settings and Other System Requirements

To use the built-in file transfer tool, the following settings must be in place:
The browser running the client must have cookies enabled.
The browser must allow pop-ups from the following servers for the Transfer Files functionality to work properly.
https://eftgateway-us.genesys.com
https://eftgateway-emea.genesys.com
https://eftgateway-apac.genesys.com

The following browser versions are currently supported:

- Internet Explorer v11 or later
- Chrome v44 or later
- Firefox v39 or later
- Safari v8 or later on Mac OS

Temporary FTP Accounts

A situation may arise when the file transfer tool on My Support cannot be used for a given transaction. To address this need, Genesys has established the Temporary FTP Account process.

For a given Case, you can ask Customer Care to create a temporary FTP account, and then use an SFTP client application of your choice to transfer the files. Potential SFTP clients for Windows users include WinSCP, FileZilla, CuteFTP, PSFTP, Core FTP, and Fire FTP. Potential SFTP clients for Mac OS users include FileZilla, ClassicFTP, Fire FTP, Secure FTP, and Cross FTP. Unix users can use the SFTP utilities built into the operating system.

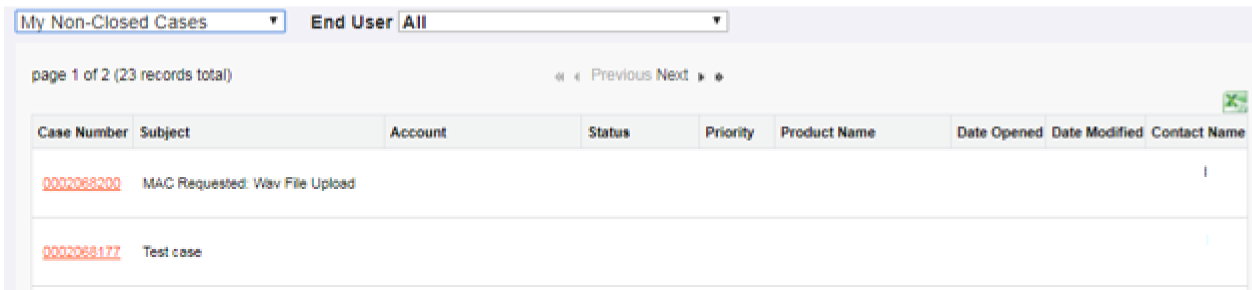
Once the temporary account is created, it will be associated with the given Case and remain active for the next 5 days (120 hours total). The login credentials along with the expiration date will be displayed in the Temporary FTP Account section of the Case details page while the temporary account is active.

Update an Open Case

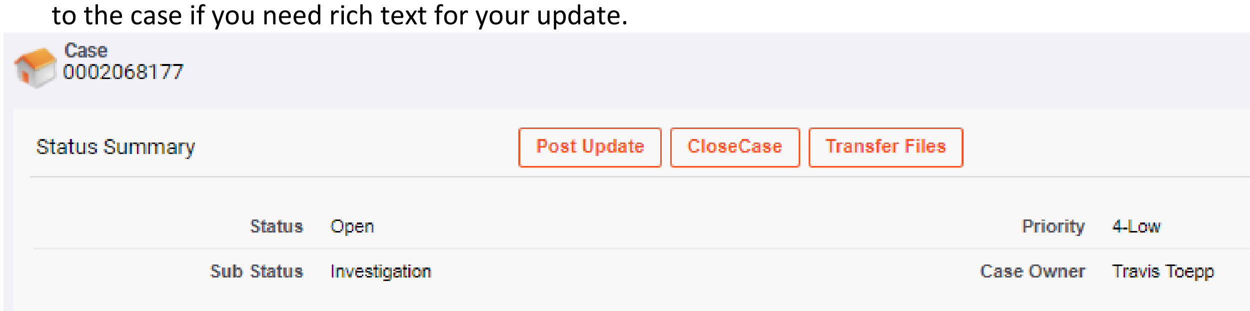
There are 2 ways to update a case: via My Support portal or via Email

Update via My Support Portal:

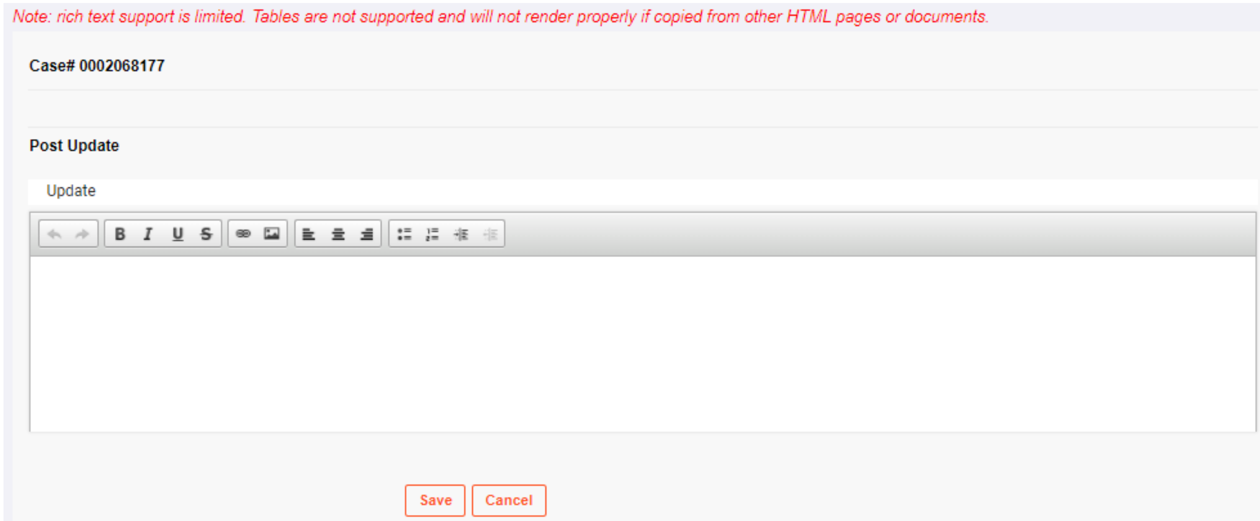
- Click the Case number you want to update



- Click 'Post Update' in the top bar
  - Note: The portal update does not support rich text. Please use the email response back to the case if you need rich text for your update.



- A separate window opens for you to add your update. Once finished, click Save at bottom of page



Update via Email

You can update an Open Case by Email if you reply to an Email originated from the Case by a Genesys Customer Care representative or to an automated Case notification. An Email originated from a Case includes a special Reference ID, which ties any reply back to the Case.
On the contrary, if you start a new Email and send it to Customer Care , it will not link to the Case automatically, even if you have specified a Case #. Such an Email will be processed by the Customer Care Admin team and may be manually linked to the Case specified, but automatic linkage will not occur unless the Email body contains the Reference ID.

NOTE: If the Case is in Awaiting Info or Solution Proposed status, and the Case contact replies to an Email originated from the Case, this will also change the Case Status to Open. In addition to this, will also see the Email updates in the Case Updates section of the Case.

Auto Follow-Up Process

The Automated Follow-up Service is designed to ensure timely and proactive follow-up with customers when we need information to advance a Case towards resolution. Automated Follow-ups will be sent to the Customer Contact on the Case according to the rules outlined below.

Auto Follow-Up #1: When Customer Care proposes a solution or requests information for an open Case, a follow-up timer is started for that Case. If there is no customer response within two (2) business days, an automated Email is sent to the customer contact who opened the Case, with a reminder of the customer action requested (provide information or accept/reject solution), and a link to access the Case.

Auto Follow-Up #2: If there is no customer response within five (5) business days after Customer Care proposes a solution or requests information for a Case, a second automated Email is sent to the customer contact who opened the Case. This email contains a reminder of the customer action requested (provide information or accept/reject solution), and a link to access the Case.

Auto Follow-Up #3: If there is no customer response within ten (10) business days after Customer Care proposes a solution or requests information for a Case, the Case is closed and a final auto follow-up Email is sent to the Customer Contact who opened the Case. All information in the Case will remain intact for one month (including any logs or attachments). The customer can reopen it only by a telephone call to Customer Care.

NOTE:

- This automated follow-up process applies to all Cases with Critical, High, Medium or Low priority.
- Automated follow-ups are not used for Critical - Production Down cases.
- The follow-up timer could start and stop several times for a given case. Some examples of requests that start the follow-up timer:
  - Send environment information
  - Describe what happened before application failure
  - Send product logs
  - Verify proposed solution

Closing Cases

You can close a Case through **My Support** using the following steps:

1. Login to **My Support** using the corporate email listed in your user profile.
2. Go to your dashboard, Select **Cases** and then **View and Manage Cases**.
3. Select the Case you want to close.
4. Click the Close Case button.
5. Select either Resolved or Cancelled as the Sub Status.
6. Enter your Closure Comment.
7. Select Close Case.

Genesys Customer Care will close a Case for the following reasons:

- The proposed solution or answer provided by Customer Care has been accepted by the Customer.
- The Customer requests closure/cancellation of the Case.
- Genesys has sent three automated follow-ups about the Case without a response from the Customer. For more information, see the Auto Follow-Up Process in the Managing Cases section.

All attached data in a closed Case (including any logs or other customer files) is purged from **My Support** one month after the case is closed.

If you reopen a Case more than 30 days after it was closed, you will need to resubmit the attached data since it is purged 30 days after the Case is closed.

Reopening Cases

A previously closed Case may be reopened if an issue has not been resolved or if a Case was closed by accident.

For the Case to be reopened, all new supporting information demonstrating that an issue has not been resolved should be supplied to Genesys Customer Care within ***30 days*** from Case closure. Without this information, the Case will not be reopened. The Customer can reopen a Case by:

- Login to **My Support**, go to your dashboard and select **View and Manage Cases** located behind the **Cases** , view My Closed Cases or All Closed Cases, then select the case and click "Request to Re-open" at the top.

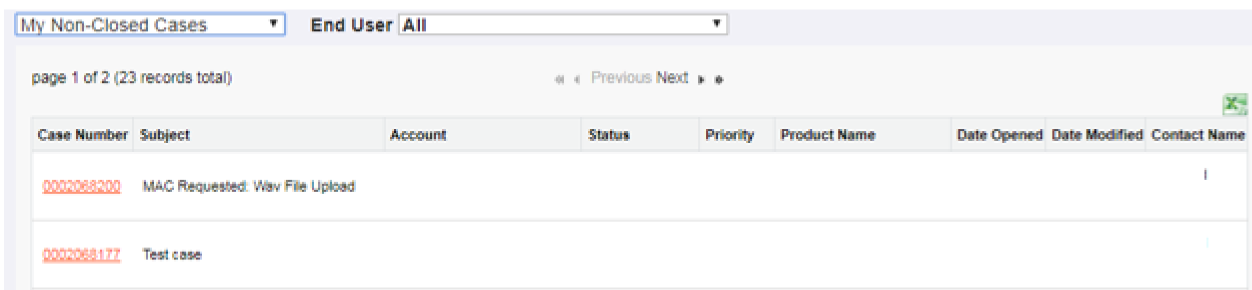
Note: This function will only be available for Cases closed within 30 days from Case closure.

- Call Customer Care.

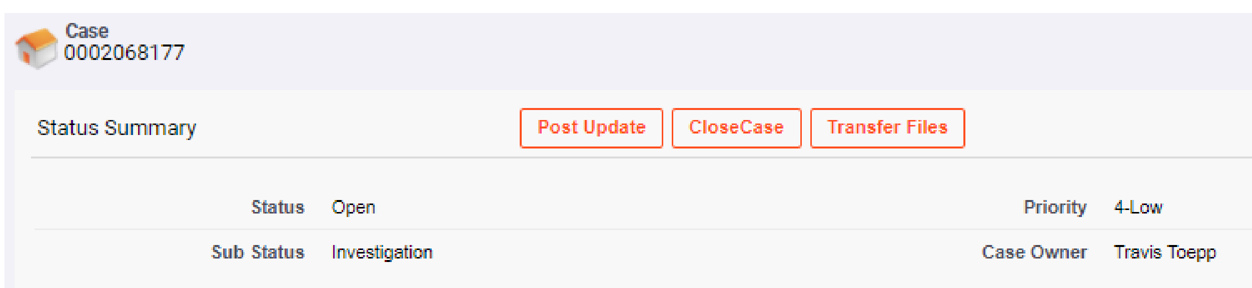
For Cases closed more than 30 days, contact Customer Care or create a new Case so supporting information can be supplied.

Update an Open Incident

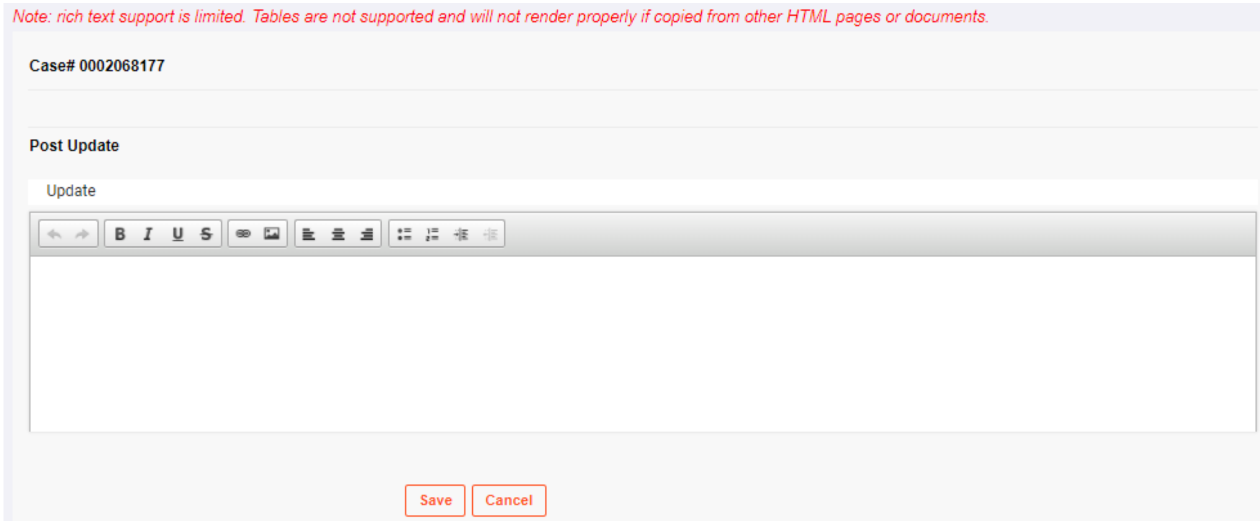
- Click the Case number you want to update



- Click 'Post Update' in the top bar



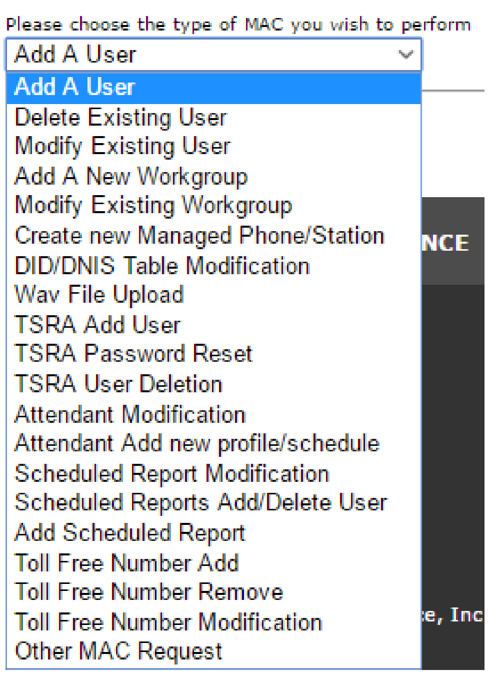
- A separate window opens for you to add your update. Once finished, click Save at bottom of page



Types of Cases

Service Request Cases

These are for Move, Add, and Changes (MAC) cases. MACs are PureConnect system changes typically made to individual users only, but not in all cases. These are the most common types of changes made on customer systems. Below is a list of Move, Add, and Changes (MAC) that are covered



In most cases, a Web form is available. Web forms ensure that all required information necessary for the change request is provided. Additional Web forms will be created as needed. All other changes will be handled on Time & Material (T&M) contract basis.

Interaction Attendant Change Cases

Interaction Attendant changes are categorized as Move, Add, and Changes (MAC) as well as billable projects. Due to the high visibility of Interaction Attendant changes strict Change Control must be adhered to for all changes. Below are the requirements for submitting a Case to update/change Interaction Attendant:

- Open a web Case, or call the Dedicated Support Services IVR to request a change
- All requirement gathering for the changes MUST happen via a telephone call with a Dedicated Support Services Engineer
    - Profile
    - Detailed description of change
    - Requested implementation completion date
- A Dedicated Support Services Engineer will document all proposed changes in the Dedicated Support Services Case, the documentation will include the following:
    - Existing call flow diagram
    - Call Flow diagram of proposed changes
    - Test plan
    - Contingency back out plan
- All proposed changes MUST be approved in the Case prior by the customer to any change being implemented
- In most cases, all testing of the changes will be done jointly with a Dedicated Support Services Engineer and the customer to ensure accuracy of changes

As a part of strict Change Control the Dedicated Support Services Engineer will also export a current Attendant configuration backup pre, and post changes.

Support Cases

A trouble Case should be opened for any unexplained behavior of the PureConnect platform. Support Cases can be opened via the web portal and via the phone. For the timeliest results, it is recommended that cases be opened via the phone.

Proactive Cases

As a Dedicated Support Services customer, your PureConnect platform is monitored regularly by the Dedicated Support Services team. Using remote monitoring telemetry, the Dedicated Support Services Engineering staff will proactively open Cases to consult with the customer to optimize the PureConnect Platform based on the customer’s usage of the system.

Admin Cases

These cases are used for problems or questions related to your My Support Portal account.

Case Severity Definitions

Prod Down

- Issues that cause a loss of core functionality of the PureConnect Platform.

High priority

- Issues that severely impact the PureConnect Platform as a whole. In these scenarios, the system will still be functioning but the usability of the system will be significantly impeded.
- High priority Cases are prioritized over all other in an engineer's queue outside of Code Red's. Incidents may be escalated to High priority, should the customer recognize the need to shift priority. This function must be performed via a phone call to the Dedicated Support Services queue. This requirement is so that Dedicated Support Services can gather all necessary information quickly to facilitate timely resolution.

Medium priority

- Issues with moderate impact on the PureConnect Platform. The reported problem only impedes the use of nonessential functions, or only affects individual users.
- This is the default incident priority.

Low priority

- Issues with minimal impact on the PureConnect Platform. The reported problem has a limited impact on nonessential system functions, is cosmetic, or is simply a documentation error. General inquiries about the PureConnect Platform are also included in this category.

Service Level Agreement

All Service Level Agreement (SLA)'s are dependent on the deployment of Genesys' remote monitoring solution which is provided at no charge with most Managed Service contracts, and redundant hardware deployed.

Customer Reports

Case Reports

Upon request all Dedicated Support Services Customers are entitled to an Open/Closed Dedicated Support Services Case report. The reports will be scheduled to be delivered on a pre-determined reoccurring time period such as weekly, bi-weekly, monthly or quarterly. In order to receive this report a Dedicated Support Services Case should be opened via the web or by phoning the Dedicated Support Services IVR and specify the following:

- Time period preference (weekly, bi-weekly, monthly or quarterly)
- Email distribution list

Escalation Management

Case Escalation

Cases opened on the My Support Portal (https://genesyspartner.force.com/customercare/) by default are opened as a Low priority. To raise the priority of a Case, please follow the following steps:

Step 1: Add an update in the case requesting that the engineer move the priority of the incident to be raised. Typically, this will move the case priority to 'Medium'. A phone call to the Dedicated Support Services Engineer is required to escalate a case to 'High' or 'Code Red' priority.

Step 2: If the incident requires further escalation, contact the Support Management staff for your region via email or phone call. Contact information will be provided upon the transition to support meeting.

Site Impacting Issues

Site impacting issues are categorized as issues that severely impede normal business operations or total system outages relating to the PureConnect Platform. All site impacting issues are categorized as Code Red or High Priority and are typically opened from the Genesys remote monitoring platform. In cases where they are not, these issues must be opened via the phone. Once a site impacting incident has been opened and further escalation is required, please contact the Support Management Team

Billing Issues

For billing inquires the following contact should be used: invoices@genesys.com. If you do not receive a timely response, please contact your Support Management Team.

User Name or Password Requests for the IVR and Web Portal

For any access issues to the Dedicated Support Services IVR and/or Web Portal, please open an Admin case or contact support.customercare@genesys.com. If you do not receive a timely response, please contact your Regional Support Management Team.

Maintenance Activities

When PureConnect services will be impacted by customer maintenance it is highly recommended that a Dedicated Support Services Case be opened for notification of probable impact. Cases will not only serve as notice to the Dedicated Support Services team of maintenance, it will also allow the Dedicated Support Services team to place the customer's monitoring platform into 'Maintenance Mode'. Maintenance mode prevents unnecessary notifications from being sent to the Dedicated Support Services support team and the customer.

Release Upgrades

Most Managed Service customers are entitled to one Release upgrade to their PureConnect platform per quarter. Please consult your Dedicated Support Services contract to verify eligibility for Release upgrades. Below are the typical reasons a Release will be applied to a customer's PureConnect platform:

- The customer is experiencing a service problem due to one of the following:
    - Known Software Change Request (SCR)
    - New Software Change Request (SCR)
- The customer has requested an upgrade to obtain and use a new feature.

The following are reasons a Release upgrade request may be denied:

- None of the approval criteria have been met above
- A Release upgrade has already been applied to the customer's system in the current quarter
- There are no system impacting issues driving the request

In all cases if a Release is going to be applied, all open Dedicated Support Services cases that are to be resolved by the Release will be closed and referenced in a new case for the installation of the Release.

Patches

Patches are released to fix specific software related issues. Patches are tested by the Genesys testing team in a 2 week release cycle. Dedicated Support Services will apply Patches to customer systems for the following reasons:

- The customer is experiencing a service problem due to one of the following:

- Known Software Change Request (SCR)
- New Software Change Request (SCR)

The following are valid reasons for reasons a Patch request may be denied:

- The customer is not using the feature of product affected by the Software Change Request (SCR)
- The Software Change Request (SCR) is not service affecting

Gateway Service Updates/Firmware Updates

Most Managed Service customers are entitled to one update/upgrade to their Gateways. Please consult your Dedicated Support Services contract to verify eligibility. Gateway updates come in two forms typically, Service Updates (SU) and Firmware Updates. Depending on the type of Gateway used determines type of update required. For instance, Interaction Gateways have Service Updates (SU); however Audiocodes Gateways have Firmware Updates. In both Service Updates (SU) and Firmware updates new features and software updates are included. Most Dedicated Support Services customers have Service Updates/Firmware Updates covered in their Dedicated Support Services contracts. Please consult your Dedicated Support Services contract to verify eligibility for Service Updates (SU) and Firmware Upgrades. Below are the conditions in which a customer's Gateway(s) will be updated:

- The customer is experiencing a service problem due to one of the following:
  - Known Software Change Request (SCR)
  - New Software Change Request (SCR)
- The customer has requested an upgrade to obtain and use a new feature released in a Service Update.
- The customer has become 3 or more Service Updates/Firmware Updates behind the current Generally Available (GA) Update.

The following are reasons a Service Update / Firmware Update request may be denied:

- None of the criteria above has been meet
- There are no system impacting issues driving the request

In all cases if a Service Update (SU)/Firmware Update is going to be applied, all open Dedicated Support Services cases that are to be resolved by the update will be closed and referenced in a new case for the installation of the Service Update (SU)/Firmware Update.

Windows Updates *(if applicable)*

Dedicated Support Services, where applicable, will only apply Genesys' Testing Department validated Microsoft updates. Microsoft critical updates typically take one calendar week to be validated by Genesys' Testing Department.

Generic System Maintenance

For a variety of reasons the Dedicated Support Services Team may need to perform maintenance activities on a customer's servers. Maintenance activities may include server switchovers, and server reboots. These activities will typically support necessary server changes or Dedicated Support Services open Cases.

System Enhancements and Optimizations

As each new Release is applied new features and optimized system configurations become available. In many cases implementation of these features will be implemented as a part of normal Dedicated Support Services Cases. In some cases, implementation of new features may require a T&M contract to implement, as the change may be very involved to implement.

System Monitoring

Dedicated Support Services monitors customers PureConnect platforms via remote monitoring. The Genesys monitoring platform is a server solution which remotely observes the servers, gateways, SIP proxies, and associated devices with the PureConnect configuration. Dedicated Support Services use of monitoring fully automates the monitoring process in a single environment 24/7/365. Dedicated Support Services customers receive the advantage of unique integration to our case management system for fast response from our Engineers. During normal business hours alerts received automatically open Prod Down cases and engage our team of Engineers. Below is brief list of items and services monitored

- PureConnect
- PureConnect Related Devices:
  - Interaction Gateways
  - Interaction SIP Proxy
  - Interaction Media Server
  - Audiocodes Mediant™ Gateways
- PureConnect Sub-systems
  - Starts/Stops/Restarts
- Windows Event Logs

*- Dedicated Support Services can only detect alerts if the customer's network can reach the Dedicated Support Services monitoring servers

System Backups

Dedicated Support Services provides for an automatic weekly configuration backup of PureConnect platform. All backups will be performed automatically with Dedicated Support Services storing a minimum of the previous two weeks' backups.

Dedicated Support Services Best Practices

Anti-Virus Software

Running active virus scanning on production servers is never recommended. If active scanning is absolutely required, please contact Dedicated Support Services for consultation. It is also not recommended to run any 3rd party software that is not certified and approved by Genesys' Testing Department. For a complete list of approved list of anti-virus software please reference the Genesys' Testing Department's website for a list of recommended software (Genesys Testing Department).

Who should contact Dedicated Support Services?

Typically access to Dedicated Support Services is funneled through a customer's own internal IT staff or a set of limited personnel familiar with the PureConnect software and features. Ideally less than five (5) people should be accessing Dedicated Support Services via the web or phone.

Change Control

Typically access to Dedicated Support Services is funneled through a customer's own internal IT staff or a set of limited personnel familiar with the PureConnect platform. Limiting the number of personnel requesting changes to the PureConnect platform decreases the chances of conflicting requests of system changes.

Attendant Changes

Changes to Interaction Attendant are some of the most important changes that can be requested by Dedicated Support Services customers. It is recommended that all Interaction Attendant changes are funneled through a smaller number of resources than normal Move, Add, Change (MAC) requests.

Network Changes

All network traffic between SIP devices should always maintain QoS markings end-to-end at all time. Changes to a Customer's network should be planned carefully in order to maintain full end-to-end network Quality of Service (QoS) to avoid any voice quality issues.