# CLEARSWIFT

### **Clearswift Support**

Using the Clearswift Support Portal

Version 1.1

07/12/12



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Using the Clearswift Support Portal



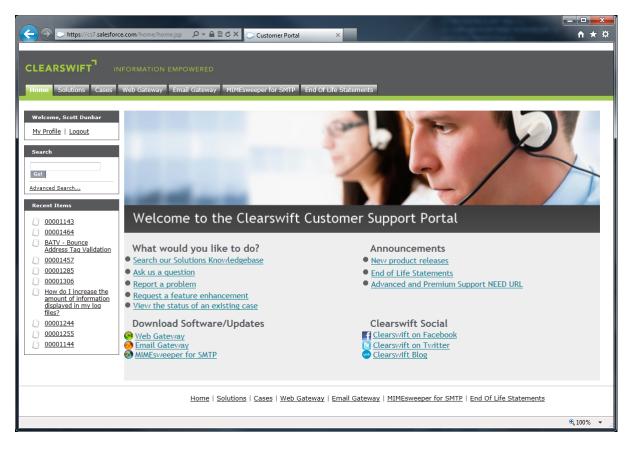
#### 1 Introduction

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
- Request a feature enhancement
- View your existing cases
- Download software/updates
- Access product documentation
- Review your service contracts



#### 2 Logging In

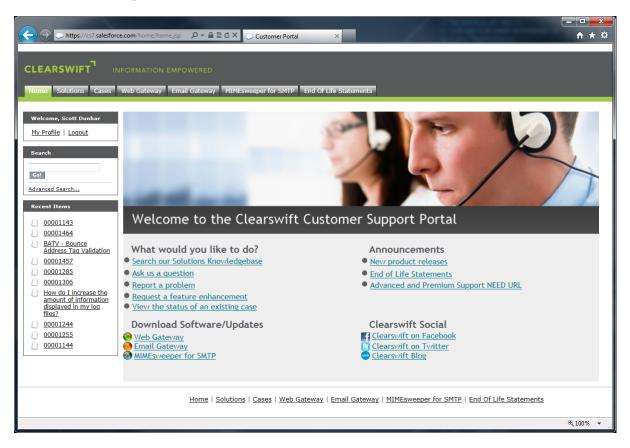


To log in to the support portal:

- 1. Browse to: <a href="http://www.clearswift.com/support/portals">http://www.clearswift.com/support/portals</a>
- 2. Enter your user name and password.
- 3. Click on the Login button.

## CLEARSWIFT

#### 3 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 select the appropriate product.
  - a. All Solutions
  - b. Email Gateway Use this for issues relating to the Clearswift SECURE Email Gateway.
  - c. Web Gateway Use this for issues relating to the Clearswift SECURE Web Gateway.
  - d. MIMEsweeper for SMTP Use this for issues relating to MIMEsweeper for SMTP, EXCHANGEmanager, IMAGEmanager and the Edge Server.
- 4. Click on the Find Solution button.
- 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.
  - a. If the solution answers your question, click on the Yes button.
  - b. If the solution did not help you answer your question, click on the No button.



#### 4 Raising a Case

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CLEARSWIFT <sup>T</sup> INFORMATION EMPOWERED Home Solutions Cases Web Gateway Email Gateway MIMEsweeper for SMTP End Of Life Statements							
Home Solutions Cases V	Web Gateway 🖌 Email Gateway 🛔	MIMEsweeper for S	MTP End Of Li	fe Statements			
Welcome, Scott Dunbar <u>My Profile</u>   <u>Logout</u>	My Open Cases					Printable View	
Search	View: My Open Cases	•					
Go!	Action Case Number	Status	<u>Contact Name</u>	Create New Case	Subject	Date/Time Opened	
Advanced Search	Edit 00001143	New	Dunbar, Scott	Problem Report	Users receiving viruses	07/09/2012 13:56	
Recent Items	Edit 00001144	Contact Input Received	Dunbar, Scott	Problem Report	PCS Not contactable	07/09/2012 17:13	
<ul> <li><u>00001143</u></li> <li><u>00001464</u></li> </ul>	Edit 00001196	Awaiting Customer	Dunbar, Scott	Problem Report	Too much porn	10/09/2012 15:10	
<u>BATV - Bounce</u> Address Tag Validation	Edit 00001199	Under Analysis L1	Dunbar, Scott	Problem Report	one email has been sent accidentally	10/09/2012 15:18	
00001457	Edit 00001209	Awaiting Customer	Dunbar, Scott	Problem Report	no mail flow	10/09/2012 15:48	
00001285           00001306	Edit 00001235	Awaiting Customer	Dunbar, Scott	Problem Report	Users unable to access PMM Portal via iPhone	11/09/2012 10:29	
How do I increase the amount of information	Edit 00001236	Under Analysis L2	Dunbar, Scott	Problem Report	image not being detected	11/09/2012 10:45	
displayed in my log files?	Edit 00001244	Under Analysis L2	Dunbar, Scott	Problem Report	Web Gateway allows porn	11/09/2012 12:00	
<u>00001244</u>	Edit 00001278	New	Dunbar, Scott	Problem Report	Kaspersky won't update	13/09/2012 15:58	
<ul> <li><u>00001255</u></li> <li><u>00001144</u></li> </ul>	Edit 00001279	Awaiting Customer	Dunbar, Scott	Problem Report	ImageLogic detecting too many false positives	13/09/2012 16:13	
	Edit 00001284	Awaiting Customer	Dunbar, Scott	Problem Report	too many emails quarantined as spam in failed to process	13/09/2012 16:20	
	Edit 00001287	New	Dunbar, Scott	Problem Report	Encryption broken - Clone Test	14/09/2012 12:43	
	Edit 00001294	New	Dunbar, Scott	Problem Report	Test Single Account	14/09/2012 13:03	
	Edit 00001300	New	Dunbar, Scott	Problem Report	Re: Sandbox: Your case 00001279 has been updated	14/09/2012 14:23	
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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:
  - a. Enhancement Request A request for enhanced or additional functionality to Clearswift products.
  - b. Hardware Incident A request related to a back-to-back hardware support contract.
  - c. **Problem Report** An error in the use/function of the software or system.
  - d. **Technical Query** A question relating to specific software or system use/functionality, or general enquiry related to Clearswift products.
  - 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 contains definitions for each case status.
- 6. Use the **Product Family** drop down list to select the product that you wish to raise the case for:
  - a. **SMTP** Use this for issues relating to MIMEsweeper for SMTP, EXCHANGEmanager, IMAGEmanager and the Edge Server.
  - b. **Email** Use this for issues relating to the Clearswift SECURE Email Gateway.
  - c. Web Use this for issues relating to the Clearswift SECURE Web Gateway.
- 7. 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 should 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 in the portal.
- 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. If you wish to attach any files to the case (e.g. log files), click on the **Upload Attachment** button and follow the instructions.



#### 5 Viewing Your Cases

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	NFORMATION EMPOWERED		
CLEARSWIFT	NFORMATION EMPOWERED		
Home Solutions Cases	Web Gateway Email Gateway	MIMEsweeper for SMTP End Of Life Statements	
		" · · · ·	
Welcome, Scott Dunbar	Case		
My Profile   Logout	00001711 « Back to List: Cases		Printable View
Search	Case Detail	Close Case Upload Attachment	
	Contact Name	Scott Dunbar Incident Category Problem Report	
Go!	Status	Awaiting Customer	=
Advanced Search	Case Detail	Web	
Recent Items	Product Family Impact	Web Organisation	
00001711	Urgency	Medium	
Web Gateway Proxy	Subject	Web Gateway experiences occassional hangs	
Randomly Hangs	Description	Our Web Gateway is experiencing periodic interruptions to browsing and becomes unresponsive.  Close Case Upload Attachment	
00001279 00001236			
00001209	Case Comments	Add Comment	
<u>00001199</u>	Comment		
<u>00001144</u>	Created By: Nick Hogg (0 Hello,	3/12/2012 10:22)	
00001143 0 00001464		Infrastructure and System Services logs.	
BATV - Bounce		Innasciucture and System Services logs.	
Address Tag Validation	Regards, Nick		
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	Solutions	View Suggested Solutions All Solutions Find Solution	
	No Solutions Attached		
	FTP Attachments		-
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You can use the Cases tab to view the:

- 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 your organisation's open and resolved cases.
  - 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 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 FTP 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:
  - a. Click on the Add Comment button.
  - b. Enter the relevant information into the Comment field.
  - c. Click on the Save button.
- 6. 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.
- 7. Alternatively, you can search for a solution yourself:
  - a. Click on the View Suggested Solutions button to see the top 10 suggested solutions.
  - b. Enter specific terms that you wish the search for and then click on the **Find Solution** button.
- 8. If you feel that the case has been appropriately resolved, click on the Close Case button.

### CLEARSWIFT

#### 6 Downloading Software/Updates



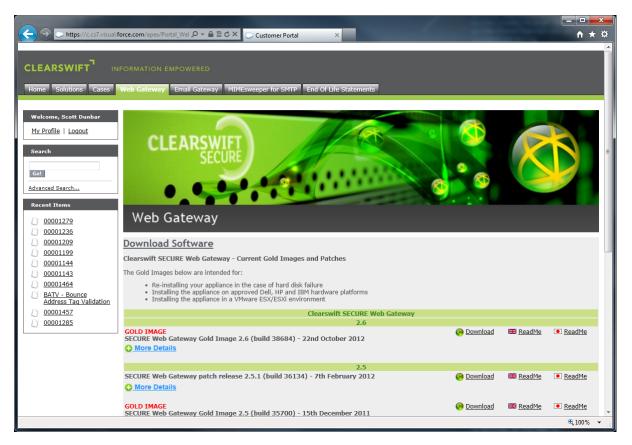
You can download the latest version of your product(s) and any updates from the relevant product tabs.

To download software/updates:

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



#### 7 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 Download Documentation section and click on the relevant link.



#### 8 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: <u>http://www.clearswift.com/support/portals</u>
- Email: <a href="mailto:support@clearswift.com">support@clearswift.com</a>
- Telephone:
  - Europe, the Middle East and Africa: +44 118 9038200
  - Asia and Pacific Regions: +61 2 9424 1210
  - o Germany: 0800 1800 556
  - o Japan: 0066 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 1 <sup>st</sup> 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 3 <sup>rd</sup> 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 t	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 3 <sup>rd</sup> Party	The Incident is escalated to a 3 <sup>rd</sup> 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.			