# Support Processes for On-Premises Licenses

Genesys Care/Support current

7/10/2024

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# Support Processes for On-Premises Licenses

When you selected Genesys, you gained a partner with the right tools and expertise to meet your business needs, along with a commitment to provide the industry's best customer experience. Genesys Care is designed to deliver on our commitment by elevating traditional support services and help you protect your mission-critical solutions, lower your operating expenses, and maximize uptime.

This document describes the **Genesys Care** offerings and provides guidelines for interacting with our Customer Care team to quickly address on-premises support requirements. It will provide you with guidelines on how to best interact with our Customer Care team to quickly address your needs.

For information regarding Genesys Care **Response, Restoration and Resolution targets** as well as information on roles and responsibilities when interacting with Customer Care, please read our Support Guide for On-Premises Licenses.

# Genesys Care

Genesys support offerings, also known as Genesys Care, are focused on your support experience through a global, live answer, 7X24 support model. Support is provided in accordance with the terms and conditions defined in the Genesys Master Software Licensing and Services Agreement ("Agreement") you have executed, as well as terms defined in this document and commonly recognized in the technology industry. Genesys offers three core support levels: **Business Care**, **Business Care Plus** and **Premium Care**. Optional support add-ons, called **Flex Care**, are also available. With these support levels, you can tailor the level of support you need to put the power of your Genesys solutions to work for you. The table below lists the features available with each support level, and Addendum A: Genesys Care Offerings describes the support levels in more detail.

***Genesys Care Features Overview***

| Feature | Business Care | Business Care Plus | Premium Care | Flex Care |
|---|---|---|---|---|
| Software Updates & Upgrades | X | X | X | |
| 7X24 Live Answer Support with Defined Service Level Targets | X | X | X | |
| Remote Diagnostics | X | X | X | |
| Knowledge Base | X | X | X | |
| Tech Tutorials | X | X | X | |
| Genesys Community | X | X | X | |
| Chat with Support Case Owner (or an available agent, if the case owner is unavailable) | X | X | X | |
| Mobile Device Access | X | X | X | |
| Troubleshooting Tools including: | | | | |
| *Workbench* | X | X | X | |
| *Log File Management Tool* | X | X | X | |
| *Log File Retrieval Service* | X | X | X | |
| *Remote Alarm Monitoring* | | X | X | X |
| Designated Case | | X | X | |

| Feature | Business Care | Business Care Plus | Premium Care | Flex Care |
|---|---|---|---|---|
| Management | | | | |
| Enhanced Response Targets | | X | X | |
| Technical Account Manager (TAM) | | | X | X |
| Troubleshooting Workshop | | | X | |
| Upgrade Advisement | | | X | |
| Routing Logic Review | | | X | |
| Support Architect | | | | X |
| Extended Support | | | | X |
| Custom Application Support | | | | X |
| Special Event Support | | | | X |

# Contact Us

Use one of the following methods to contact Customer Care seven (7) days a week, 24 hours a day:

- My Support (Web)
- Telephone
- Email

For more information, please review **When to Contact Customer Care**.

## Web

### My Support

Open and manage your cases by logging into the Customer Care portal, **My Support**.
For instructions on using **My Support**, refer to the sections **My Support** and **Case Management** from the navigation bar on the left.

## Telephone

### Customer Care Telephone Numbers

When you call, you will be asked to provide your personal PIN so that we can address your needs more quickly. To locate your PIN, login to **My Support** and from the Home page, click the Contact Information link under My Profile at the top left.

Visit the Contact Us page for regional Customer Care phone numbers.

## Email

### Emailing Customer Care

Please use Customer Care for all Email communications with Customer Care. You can contact us via

Email for updates on existing Cases or if you are unable to login to My Support.

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.

Please do not use this email address to report new issues or open Cases. Use My Support (website) or call Customer Care to open new Cases.

# Working with Support

This section of support processes describes best practices for working with Genesys Customer Care including:

- When to Contact Customer Care
- Remote Diagnostics
- Onsite Support

## When to Contact Us

## When should you contact Customer Care

The following processes describe the types of issues and requests you can expect Genesys Customer Care to help you resolve, and types of issues that you will need to resolve with other Genesys groups or other vendors.

Contact Customer Care in the following situations:

- You have a problem with the operation of Genesys products in a production or development environment.
- You have a problem with licenses that requires immediate attention in order to ensure that a production environment remains operational.
- You have post-sale technical questions about the operation of supported Genesys products.
- You have product change or enhancement requests.
- You are notifying us of important project milestones (such as switch upgrades, Genesys software upgrades, or production cut over dates) so that appropriate staff can be scheduled to be on call or available in the event that Customer Care is required. For more information, see Planned Major Changes in Your Genesys Environment.
- You have account management questions or changes regarding your Genesys account.
- You have problems logging into **My Support** or accessing **My Support** functionality.

## Other Issues

Customer Care cannot help you with the types of issues described in the following chart. Instead, the issue should be raised with the suggested contact for each type of issue.

| TYPE OF ISSUE | WHO TO CONTACT |
|---|---|
| Genesys product pricing or quotations | Your Genesys Sales Representative |
| Genesys software upgrades not related to a specific problem that has been reported to Customer Care | Your Genesys Sales Representative |
| Questions about Genesys Education Services or Professional Services | Your Genesys Sales Representative |
| Problems with general software programming not specific to Genesys | Your internal programming experts (Example: how to define object properties in Visual Basic.) |
| Problems with products or applications not produced by Genesys | The appropriate product vendor (Examples: switches and IVRs). If a problem crosses multiple vendors, Genesys Customer Care would be pleased to work with the other vendors, but you will need to facilitate this interaction. |
| Issues with custom software developed by a third-party systems integrator | The third-party systems integrator |
| Pre-sales design requests and questions | Your Genesys Sales Representative or Sales Engineer |
| Contact center architecture and design questions | Your Genesys Sales Representative, who can arrange for Genesys Professional Services to assist |
| Anticipated license file changes or additions | Your Genesys Sales Representative or Sales Engineer |

## Planned Major Changes in Your Genesys Environment

If you are planning a major upgrade to a new Genesys release or are deploying new Genesys solutions that could affect the stability of your production environment, it’s a good idea to alert Customer Care so we have the information available as a reference in case you encounter problems. Please provide us with the following information:

- Your Company and/or Site Name
- When will you be conducting the migration (dates and times)
- What are you migrating from? (software and version)
- What are you migrating to? (software and version)
- Details of your environment, including versions: operating system, switch, DBMS
- Contact Information. Provide names and contact methods for those who will be doing the migration. (Example: John Smith, mobile +123-456-7890, email john.smith@yourcompany.com)
- List any open Cases related to this migration

Please email this information at least one week in advance of your planned changes to Customer Care

# Remote Diagnostics

## What you should know about Remote Diagnostics

Genesys products are designed to enable Genesys Customer Care personnel to successfully troubleshoot problems without the need to access the customer's network where the Genesys software is installed. This approach simplifies the customer's network security procedures and eliminates any potential risks when remotely accessing the network. It is Genesys' experience that nearly all problems can be resolved in this manner.

The problem determination process usually involves detailed analysis of Genesys configuration and log files by support personnel using a Genesys lab environment and troubleshooting tools. Since these log and configuration files can be very large, online analysis can take a long time and use up valuable network bandwidth.

The best approach is for the Customer to electronically send these files to Genesys for analysis.

In a very small percentage of cases, for example when Genesys needs to view the GUI and a screen shot is not sufficient; Genesys may request remote access to the Genesys products through commercially available, customer-controlled, screen sharing software. During remote access sessions, Customers and Partners are responsible for following their companies' data privacy guidelines when sharing a remote network view with Genesys.

# Onsite Support

## What you should know about Onsite Support

Genesys Customer Care is a remote support service, offering customers a choice of using the web, email, fax, or phone to request assistance and to communicate with Customer Care.

To provide the best remote support possible, Customer Care has made significant investments in staffing its support centers with product experts, in building out labs to replicate all types of problems, and in developing methodologies and tools for remote problem resolution. These investments over the years have paid off as problem resolution times are decreasing and there is very rarely a need to go on-site to resolve an issue.

In the unlikely situation where all efforts to resolve an issue remotely fail to produce a satisfactory resolution, Customer Care may need to go on-site to resolve a critical problem. If it turns out that the problem is not caused by a Genesys software defect, then Customer Care reserves the right to charge time and materials at Genesys’ then current rates and all travel and expenses.

# Troubleshooting Tools

To assist our customers and partners with troubleshooting issues and working with Customer Care, we have created several tools and services. The following is a summary of the Genesys Care tools available to customers and partners with an active Genesys Business Care, Business Care Plus or Premium Care subscription.

If you have a question or issue regarding Genesys Care Tools, please open a Support Case with Customer Care.

## Workbench

Delivers a suite of troubleshooting tools that simplify and accelerate the identification and resolution of issues in your Genesys environment. Workbench does not require the installation of other Genesys Care tools.

- Workbench Download Page
- Workbench User’s Guide
- Workbench Release Notes

## Log File Management Tool (LFMT)

Provides a central repository to store indexed application log files to enable faster search and retrieval capabilities. Also provides a scrubbing feature so that log files uploaded to Customer Care do not contain sensitive information.

- LFMT Download Page
- LFMT Deployment and User’s Guide
- LFMT Release Notes

## Log File Masking Utility

Enables you to scrub log files of sensitive info prior to sending to Customer Care.

- Download Page
- Log File Masking Utility User’s Guide

## Log File Retrieval Service

Request this service to allow Customer Care to retrieve log files needed for open Support Cases. The Log File Management Tool must be deployed before this service can be requested. After deploying LFMT, complete the Log File Retrieval setup steps and then submit an Admin Case with subtype Log File Retrieval Service to request activation for the service.

- Log File Retrieval Service Information

## Remote Alarm Monitoring with Workbench

Remote Alarm Monitoring with Workbench is included with Business Care Plus and Premium Care and available as a Flex Care option to Business Care. Workbench must be deployed before Remote Alarm Monitoring can be activated. Once it’s activated, you can receive notifications when Genesys detects supported critical and major alarms, and Genesys will provide proactive Customer Care support if needed. To receive full Remote Alarm Monitoring benefits, it is recommended that LFMT (with Log File Retrieval Service) and the Genesys Care Mobile App also be downloaded and deployed.

- Remote Alarm Monitoring Information Page
- Remote Alarm Monitoring section in the Workbench User’s Guide

## Genesys Care Mobile App

Delivers the convenience to view/manage cases from your mobile device (iOS and Android). Additionally, view alarm data if subscribed to Remote Alarm Monitoring with Workbench.

- Mobile App Information
- Genesys Care Mobile App User’s Guide

## Other Tools

Access a variety of additional troubleshooting tools.

- Other Tools Information and Download Page

# Support Definitions

Genesys Customer Care uses several key concepts to describe our relationships with Customers and Partners. These concepts are defined below.

## Designated Contact

Every Genesys Customer and Partner must identify at least two contacts that will be given special access permissions to interact with Customer Care on behalf of one or more Sold To and End User combinations. Customer Care calls them **Designated Contacts**. They are the only customer or partner contacts who can open and manage Cases (by phone or web) and download Genesys software.

The Designated Contact policy helps Customer Care safeguard the security of Customer and Partner data and ensure that we are providing service and information about your account to contacts that should be representing your company. Assigning Designated Contacts to work with Customer Care also assists us in making sure that your contacts understand how to work with Customer Care effectively and are informed of critical Customer Care information. There are minimum requirements that must be met to be a Designated Contact. Please review the Designated Contact Requirements and Responsibilities in this document or in the Support Guide for On-Premises Licenses when selecting Designated Contacts for your account.

## Sold To and End User Accounts

The **Sold To** is the Customer or Partner company that purchased Customer Care maintenance and support services with Genesys. This purchase is legally documented in a Service Contract.

The **End User** is the company that is using the Genesys products.

With a direct Customer, the same company is both the Sold To and the End User. In this case, the End User has a direct Service Contract with Genesys, and Designated Contacts at that End User can open new Support Cases, view and update their company's Cases, and download software updates for their company.

When the End User has purchased support through a Partner, only the Partner (the Sold To) is allowed to open and update Cases with Customer Care and download software on behalf of the End User. In this case, the End User has an indirect relationship with Genesys because the Partner owns the Service Contract and manages the relationship with Genesys on behalf of the End User.

Generally, the Partner provides initial support to the End User, and opens Cases with Customer Care on behalf of the End User only when the Partner is unable to solve the problem. For End Users who want to track Genesys cases opened on their behalf by their Partner, Customer Care can provide Read-Only access once approval has been granted by the Partner to contacts from the End User company.

## Support Owner

The **Support Owner** is the company responsible for delivering support to the End User and managing the support interactions with Genesys. For a direct customer, this is the same company as the Sold To or End User. When the End User has purchased support through a Partner, the Support Owner may be the same as the Sold To. However, when the partner has contracted with another company to provide support for an End User, the Support Owner is that third party which is actually providing support. In all cases, the Support Owner is the main company working directly with Genesys Customer Care on behalf of the End User.

## Service Contract

A **Service Contract** is the legal agreement between Genesys and a Customer or Partner company which entitles that company to receive product upgrades and support services for the Genesys products specified in the Service Contract. The Service Contract is also called a maintenance agreement.

## Contact PIN

When you telephone Customer Care, you may need to identify yourself by a PIN. This is a personal identification number that is assigned to every Customer and Partner contact. This helps Customer Care identify you, which can help you get in touch with a skilled Customer Care analyst more quickly. Your PIN may be requested whether you are being routed through voice menus or are talking directly with an analyst.

In addition to requesting your Contact PIN, we will also verify if you are a Designated Contact. Only Designated Contacts will be allowed to open a new Case or work on an existing Case.

PINs will not be distributed by email for security reasons. You can find your PIN in your profile. After you login to **My Support**, click **Manage Profile** in the header and then the **My Profile** tile. If the PIN field is empty, please open an Admin Case.

# Designated Contact

## Designated Contact Access Requirements

To be given special Designated Contact (read-write) access permissions, contacts must meet these requirements:

1. By becoming a Designated Contact, you acknowledge that you understand the Terms and Conditions of being a Designated Contact. You can review the current Terms at any time at: http://www.genesys.com/customer-care/terms-and-conditions.
2. A named Designated Approver from within the Sold To Account who can approve contact access requests where Case information will be visible.
3. The contact must provide a corporate email address that is assigned to that contact individually. Personal email addresses and email aliases are not accepted as the main communication address.
4. The contact must have access to the Genesys Customer Care web portal, **My Support**, and agree to receive notices on **My Support**.
5. Contacts are expected to be trained and hold current certification on the products for which they open Cases.
6. The contact must work for the Support Owner or have approval from the Support Owner. Employees of the End User for this maintenance agreement cannot be Designated Contacts unless the End User is a division or subsidiary of the Sold To, or the End User has a direct maintenance agreement with Genesys (and is also the Sold To).
7. If all Service Contracts are terminated or closed for all Sold To and End User combinations for which a Designated Contact has access, the contact will lose Designated Contact access. Please see the Customer Care Terms and Conditions for more information on why a contact may lose Designated Contact access.

Other employees of the Sold To and End User companies on a Service Contract can be granted read-only access to the Cases for that contract. These contacts are not considered Designated Contacts.

## Designated Contact Responsibilities

Customer contacts who are granted Designated Contact access permissions with Genesys Customer Care are expected to fulfill the following responsibilities. To ensure that issues are resolved as promptly as possible, please meet these responsibilities before you contact Customer Care. Failure to fulfill these responsibilities will result in delays in problem resolution and may result in Customer Care revoking your Designated Contact permissions.

1. You must be able to provide your Contact PIN if requested when you call in to Customer Care.
2. You must have a complete technical understanding of your own contact center infrastructure, including

licensed software and versions deployed.

3. You must be able to specify the names of the Genesys products you are using and the version number of each.
4. You must be adequately trained to use the Genesys products deployed at your company.
5. You should thoroughly review Genesys product and technical documentation and Knowledge Base before you contact Customer Care for assistance.
6. You must be able to provide an accurate description of any issue you report and its business impact.
7. You must report each issue separately so issues can be individually tracked to a successful resolution. Reporting multiple issues on one form or adding new issues into correspondence about an existing issue may result in problems being overlooked and not resolved.
8. You must be able to transfer information (for example, log files, configuration files, Unix full core file, Dr. Watson file, etc.) electronically, to help us analyze your issue.
9. You must purge all personally identifiable information and other sensitive data from any information you share with Genesys when submitting a new Case, when sending Case updates by email, and when submitting log files and other Case updates using the File Transfer Tool, a temporary FTP account, and other parts of the Genesys **My Support** web portal.
10. You must be available to work with a Customer Care Analyst to resolve your issue.
11. If you have requested Critical Priority for an issue, you or another Designated Contact at your company must be available at all times to work with Customer Care in the resolution of your issue.
12. When Customer Care requests information or recommends actions to solve an issue, you must respond in a timeline aligned with the agreed priority for that Case.
13. During investigation of a Case, if Genesys requests remote access to view the Genesys products in your environment through commercially available, customer-controlled, screen sharing software, you must ensure that you follow your company's data privacy guidelines when sharing a remote view of your network with Genesys.
14. You agree to stay current on Customer Care processes and other news, including receiving and reading Genesys customer newsletters and Customer Care emails as well as notices on **My Support**.

# My Support

**My Support** is our Customer Care portal that allows you to:

- Open and manage your support cases
- Search our Knowledge Base and Technical Documentation site
- Register for and view our Tech Tutorials
- Learn about current Customer Care news and announcements
- Access Genesys Care Apps and Tools

> **Important**
>
> For more information, log into the My Support portal.

# Case Management

The Case Management section includes our support processes and recommended best practices for opening and managing support cases with Genesys Customer Care. Only Designated Contacts are allowed to create a new Case or update an existing Case. Other employees who work for Genesys direct Customers, Partners, Resellers, or End Users can request Read access to **My Support** to view Cases opened by Designated Contacts on behalf of their company. All access for End Users will require approval from the Partner.

# Login Info

## Access Levels

### My Support Access Levels

To request a different support access level for your existing account, click the down arrow next to your name located in the upper right corner and click the **Manage Profile** link then **My Support Access** . Complete the form and submit your request.

It usually takes up to two business days to process a request. Customer Care Admin may contact you by phone or email to obtain additional information. We may also contact the prime Support Contact for the Sold To company that you specified, to verify that you should be a Designated Contact on behalf of that company and its End Users.

***Note***: Other employees of the Sold To and End User companies on a Service Contract can be granted read-only access to the Cases for those companies. These contacts are not considered Designated Contacts. Visit Request My Support Login to request read-only access to one or more Sold To and End User combinations.

***My Support Functions Granted for Each Access Level***

| SUPPORT ACCESS | BASIC ACCESS | READ-ONLY | READ-WRITE (DESIGNATED CONTACT) |
|---|---|---|---|
| Log into My Support portal | X | X | X |
| Register and attend live Tech Tutorials | X | X | X |
| View and download recorded Tech Tutorials | X | X | X |
| Search, view, and download Knowledge Base content | X | X | X |
| View existing Cases | | X | X |
| Create new Cases, modify existing Cases, submit Feature Requests | | | X |
| Download software and order controlled software | | | X |

# Manage Profile

## How to Manage Your My Support Profile

When a Contact opens a **My Support** login account with Genesys Customer Care, a profile is created with all the pertinent information for that individual. Contacts can update their profiles by logging into **My Support** and clicking the down arrow located next to your name and then **My Support Profile**. A Contact may also submit an Admin Case to request contact information updates. The following information is mandatory for a contact profile:

- First Name
- Last Name
- Work Email
- Employer
- Country

Please update your **My Support** login profile:

- If you change employers
- If any of your contact information changes (email addresses, phone numbers, mailing address, etc.)

***Note***: Customer Care Data Admin will NOT create a new Contact profile from an existing profile. All requests to create a NEW **My Support** Login must be submitted on Request My Support Login.

# PIN

## Personal Identification Number (PIN)

A Personal Identification Number (PIN) is assigned to every Customer and Partner contact with a login to **My Support**. Your PIN can be found on the My Support Portal by clicking the down arrow located next to your name and then **My Support Profile**. Your **IVR Code/PIN** will appear before your First Name.

When you telephone Customer Care, you may need to identify yourself using your PIN. PINs are not distributed by email for security reasons.

# Documentation

Genesys documentation and Knowledge Base articles can be accessed from **My Support**. Only users with **My Support** access can view and download this information.

## Finding Genesys Product Documentation

You can use any of these ways to access Genesys product documentation:

- Search the Knowledge Base from **My Support** for articles published by Customer Care including common support issues and product advisories.
- Search Genesys Technical Documentation by going here.

Content available through the Technical Documentation site includes:

- Release Advisories and Product Alerts - Information about Genesys releases
- Release Notes - Fixes and features implemented in Genesys releases
- Product Manuals and Help Files- Product Guides and Help Files
- Cross-Product Solution Guides - Information about Genesys cross-product solutions and configurations
- Third Party Documentation - Product Guides for third-party software

You can also click on the documentation links in the Additional Information section of any product's Release Notes to see documentation about that product.

Finally, you can order the Genesys Documentation Library DVD for your Genesys version, using your normal channels for purchasing products and services.

# Tech Tutorials

Customer Care offers live Tech Tutorials presented by our worldwide subject matter experts. Please take this opportunity to learn from our Support experts and engage them with your questions during the question and answer session following the presentation. This service is offered at no additional charge for customers and partners with current maintenance agreements.

For info about upcoming Tech Tutorials, visit the Tech Tutorials page in **My Support**. You can also view or download recorded Tech Tutorials.

# Knowledge Base

The Genesys Knowledge Base, which is available from **My Support**, enables you to access an extensive database of technical solutions, product advisories, and other knowledge articles designed to answer questions, provide how-to information, communicate best practices, and minimize the effort required for issue identification and resolution. You can also find technical manuals and release notes in the Knowledge Base as well as on the Genesys Technical Documentation site.

To search the Knowledge Base, login to **My Support** and enter a topic directly into the Search box.

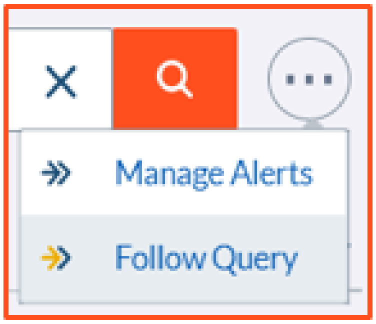
## Search Alerts

Search Alerts allow you to create an email subscription based on your search results. When a document is updated that matches the search results, you will receive an email. Emails are sent either daily, weekly, or monthly.

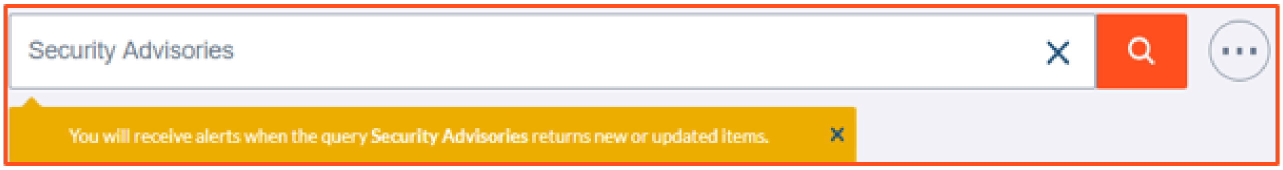
## How to Create Search Alerts from a Query

Start at your Knowledge Search results page. You can search using keywords in the text field, as well as narrow down your search by selecting different Knowledge Sources. You can also narrow down the search using the filters on the left-hand side. Please note that different sources will show different filters.

Once you have your search specified, click the "ellipsis" icon on the right side of the search text box, and select "Follow Query".




You will see a confirmation message like this:

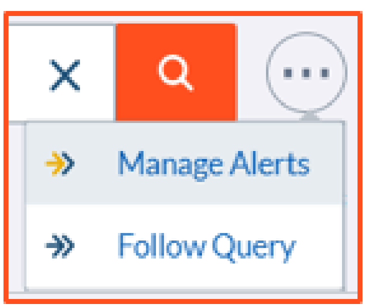



## How to Follow a Search Result

You can follow an individual search result and receive an email when it is updated. First, you need to find the document in your search results list. At the top left of the result, there is a "=>> Follow" link. Click on this link to follow the document. You can click it again to stop following.

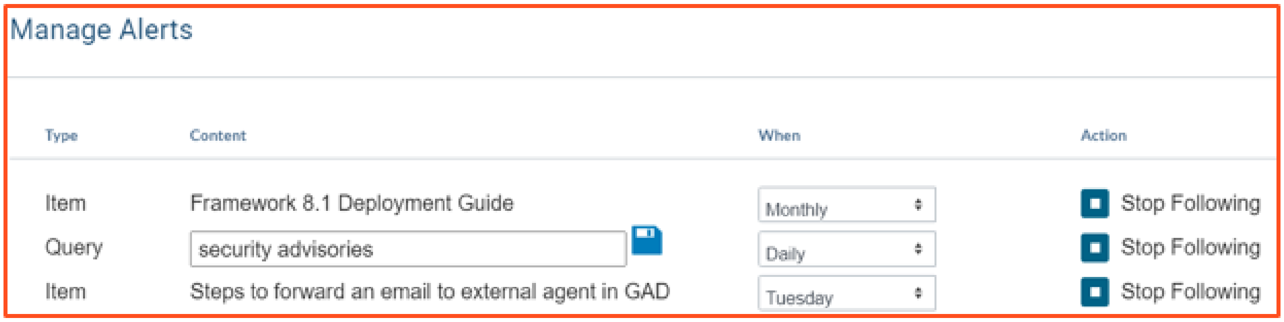

## How to manage your Search Alerts

In your search results, click the "ellipsis" icon on the right side of the search text box, and select "Manage Alerts".



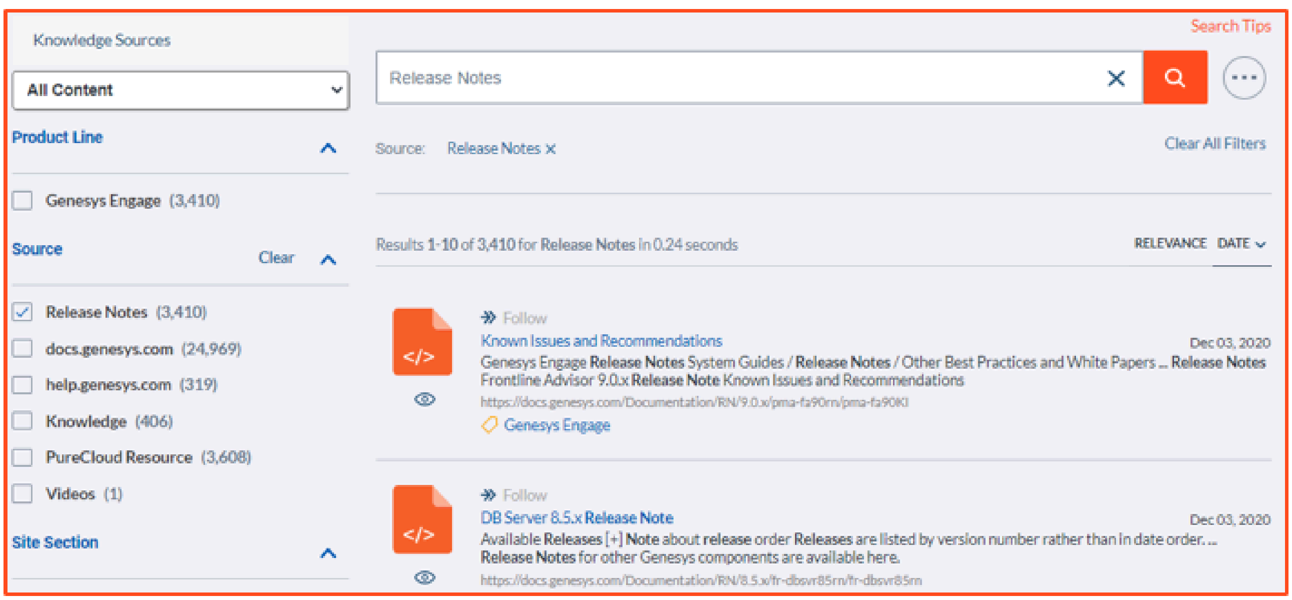

You will see your list of Alerts. Here you can choose to receive the Alerts daily, weekly, or monthly.

When following a Query type, you have the option of editing the text field should you wish to expand on the description. For example, Security Advisories – using Genesys Engage facet. Please note this doesn’t change the query expression.

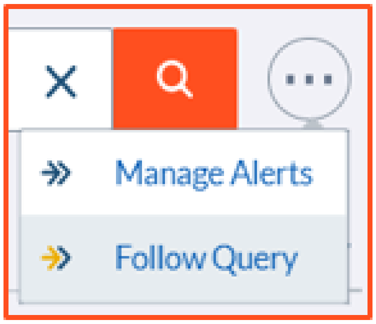



## Example: Create a Search Alert for Release Notes

First, you need to create a query to select the Release Notes you are interested in. In your search query, you can type "Release Notes". On the search results page, change the Knowledge Source drop-down to "All Content". Then select **Release Notes** within the Source Facet. This changes the source to just Release Notes.




Second, you need to create the Search Alert. Click the "ellipsis" icon on the right side of the search text box, and select "Follow Query". You will see a confirmation message.

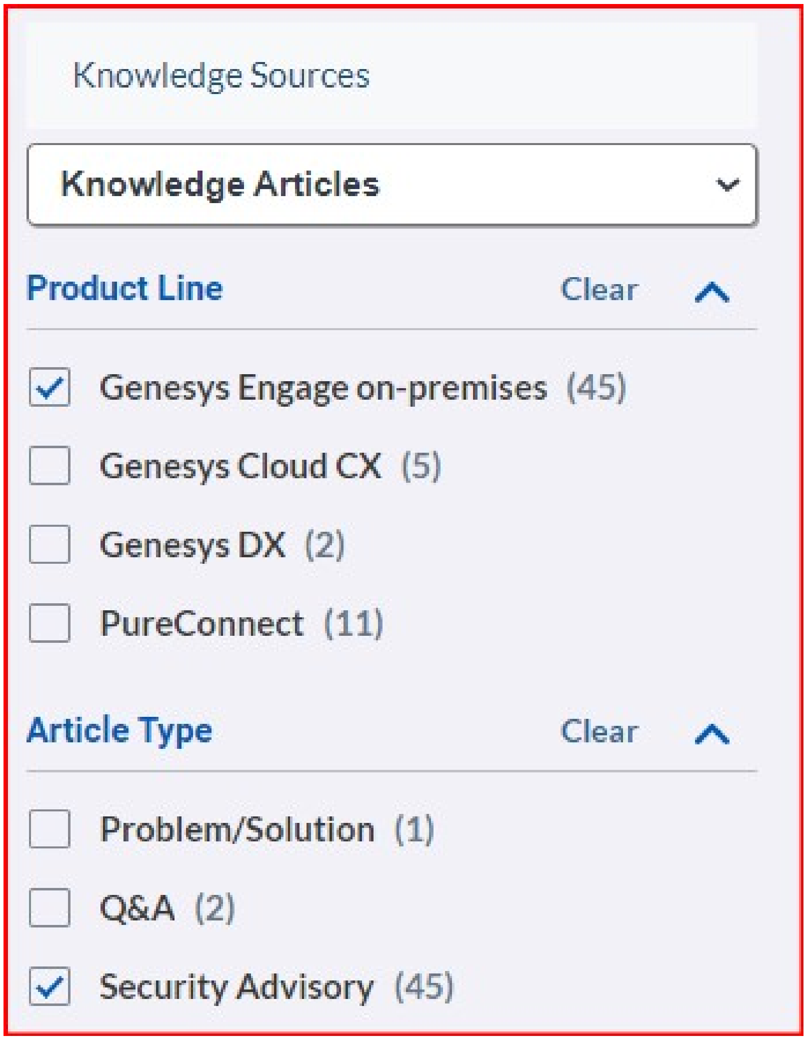



## Security and Product Advisories

### How to Search for Security Advisories

You can find Security Advisories by:

- Log in to **My Support**
- Type "Security Advisory" in the **Search** box and click enter
- On the left-hand sidebar, for **Knowledge Sources** select Knowledge Articles from the list, under **Product Line** select Genesys Engage on-premises and **Article Type** select Knowledge Support Articles

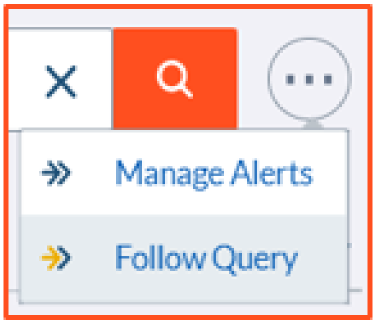



## How to Subscribe to Security Advisories

As described within Search Alerts, you can subscribe to specific article alerts to stay informed on current product information. Genesys recommends that all Designated Contacts, at minimum, subscribe to Genesys Security Advisories to get immediate notification on critical security notices. Product advisories can be searched within “Problem/Solution” Article type.

To subscribe to Security Advisories, login to **My Support**. Then, search for Security Advisories as outlined above.

- Click on the "ellipsis" icon beside the text search box, select "Follow Query"




If you want to see the latest Security Advisories at the top of the results list:

- At the top right of the Results List are two words "Relevance Date"
- Click on Date

# Search Tips

## Knowledge Search Tips

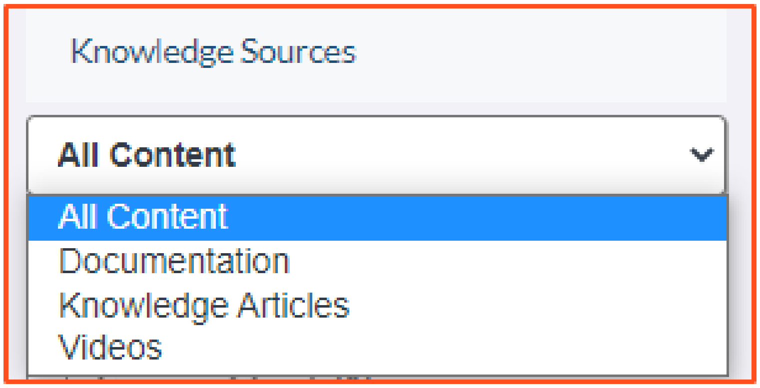
You can search for knowledge articles and other content on the **My Support** "Home" page using the **Search** box. Simply enter the question or text you want to search on and hit enter on your keyboard.

## Search Results

Your search results will be listed in order of **Relevance** by default. Select **Date** to sort by date. Select it again to change the date order (new->old, old->new).

## Knowledge Sources

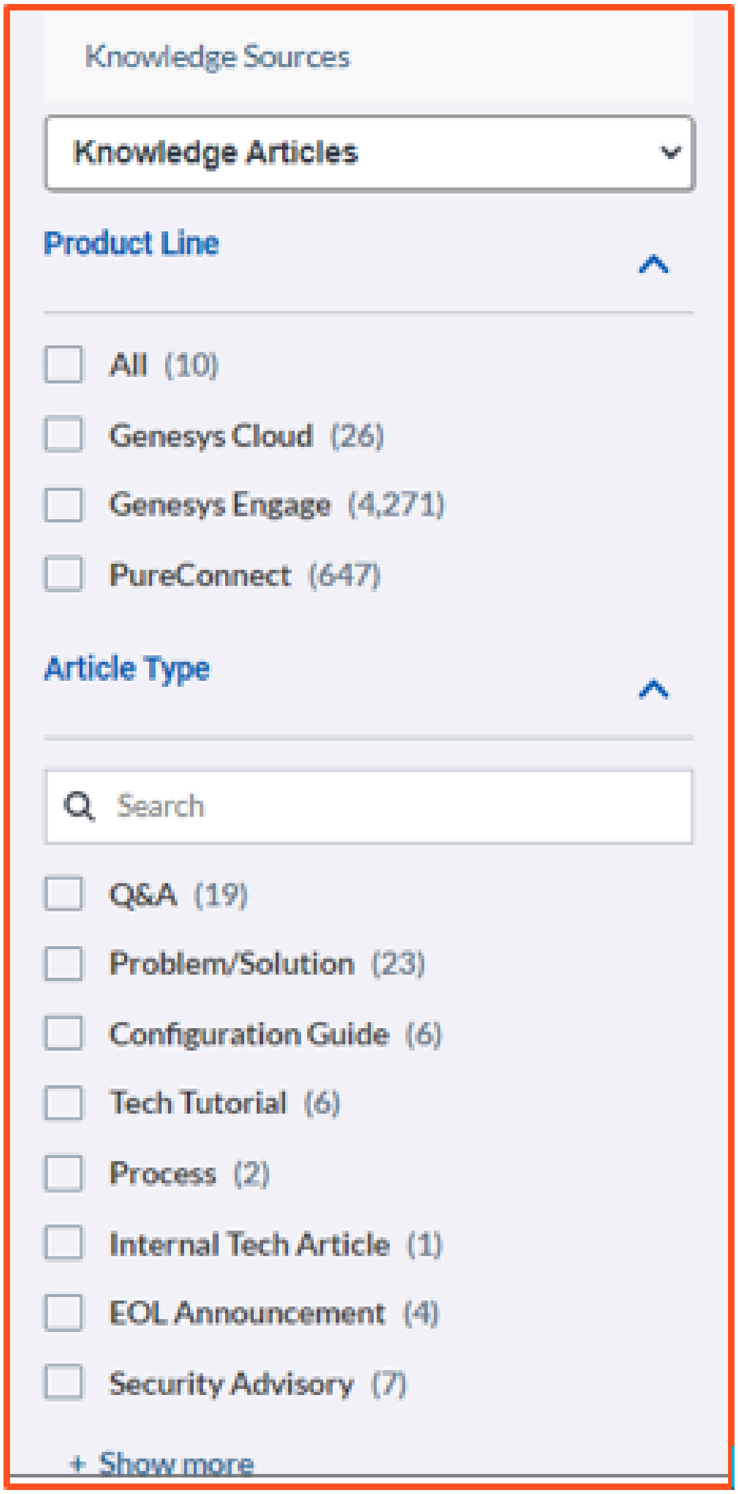
At the top of the left menu, you will see **Knowledge Sources**. This defaults to **All Content**. The drop-down arrow allows you to select specific sources. Selecting different sources gives you access to more filters.




- All Content - All available content is searched
- Documentation - Product Manuals and Guides created by Technical Publications
- Knowledge Articles - Knowledge Articles created by Genesys Customer Care
- Videos – Videos created by Technical Publications and Genesys Customer Care

## Filters

To refine or narrow your results list, you can select one of the options on the left-hand menu. The filter options are dynamic and depend on the Knowledge Source you have selected. Genesys recommends you start out with a text search and then filter if required.


Knowledge Sources
Knowledge Articles
Product Line
All (10)
Genesys Cloud (26)
Genesys Engage (4,271)
PureConnect (647)
Article Type
Search
Q&A (19)
Problem/Solution (23)
Configuration Guide (6)
Tech Tutorial (6)
Process (2)
Internal Tech Article (1)
EOL Announcement (4)
Security Advisory (7)
+ Show more

# Wildcards

## * Asterisks

You can use a wildcard * Asterisk to expand the search term. For example:

**orang*** would find articles that contain **“orange”** and **“oranges.”**

## ? Question

You can use a wildcard ? Question Mark to replace a character in the search word. For example:

**gr?y** would find articles that contain **“grey”** and **“gray.”**

# Operators

Knowledge Search supports the use of operators: **AND**, **OR**, **NOT** and **NEAR**. The NEAR operator allows you to search for two terms that are close to one another in the document.

For example:

apples **AND** oranges - would find articles with **both** apples and oranges in the text.

apples **OR** oranges - would find articles with **either** apples **or** oranges in the text, but not both.

apples **NOT** oranges - would find articles with **only** apples, **no mention** of oranges.

apples **NEAR** oranges - would find articles with apples and oranges in the text, where oranges appeared within 10 terms from apples.

apples **NEAR:20** oranges - would find articles with apples and oranges in the text, where oranges appeared within 20 terms from apples.

# Exact Phrase Searches

Knowledge Search supports the use of quotation marks “ ” to enforce exact search terms. For example:

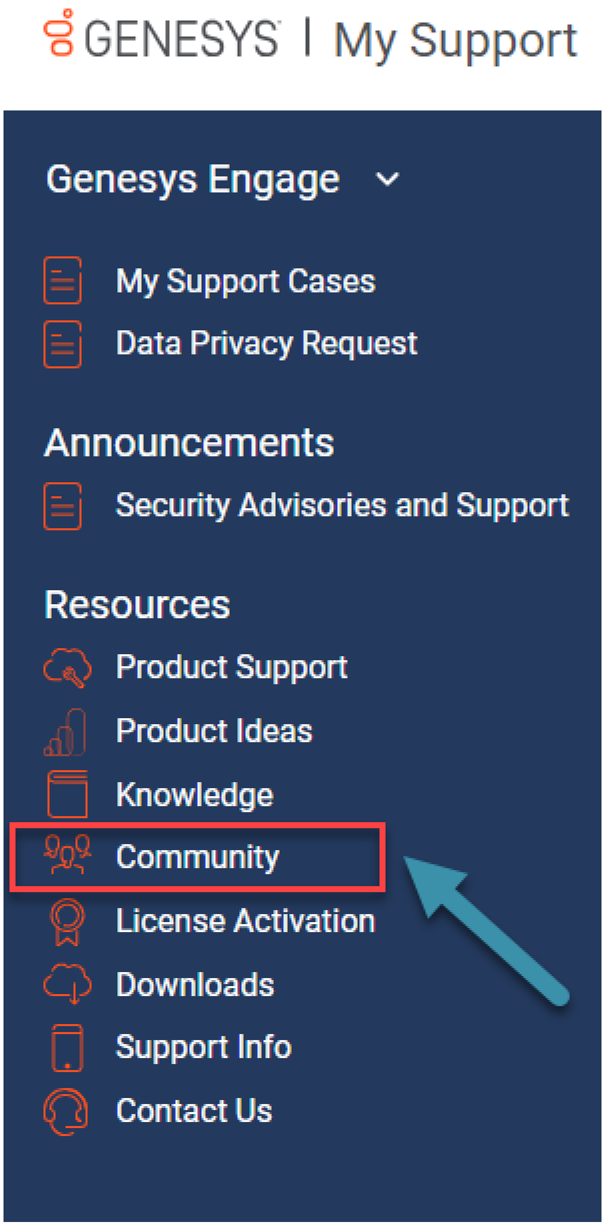
**“apples and oranges”** would find articles that have "apples and oranges" in the text, but would not find articles with "oranges and apples", or the individual words "apples" or "oranges" that are separated by other text.

# Community

The Genesys Customer Care Community site provides access to Customer Forums and other interactive features. You can use the Customer Care Questions Forum to ask technical questions and exchange ideas with other Customers and Genesys staff.

## Customer Care Questions Forum

This forum is designed for Genesys Customers to have active discussions on technical topics. To access the forum, login to **My Support** and click **Community** in the navigation bar.




If you need more help, please open a Case. Customer Care is always happy to answer your questions.

---

**Like, Follow and Flag**

When viewing a post, you will see the words Like, Follow and Flag at the bottom of the post.

- You can Like a post to show you agree with it.
- You can Follow a post to receive email notifications when there are new comments.

- You can Flag a post for Spam or Inappropriate content.

# Supported Browsers

The following browsers are supported for the Genesys Customer Care **My Support** portal:

- Microsoft® Internet Explorer® versions 9, 10, 11 (see note below)
- Google Chrome™, most recent stable version
- Mozilla® Firefox®, most recent stable version
- Apple® Safari® versions 5.x and 6.x on Mac OS X
- Opera™ is not supported.

***NOTE***: As of June 12, 2015, Genesys has discontinued support for Microsoft® Internet Explorer® versions 7 and 8.

# Case Management

The Case Management section includes our support processes and recommended best practices for opening and managing support cases with Genesys Customer Care. Only Designated Contacts are allowed to create a new Case or update an existing Case. Other employees who work for Genesys direct Customers, Partners, Resellers, or End Users can request Read access to **My Support** to view Cases opened by Designated Contacts on behalf of their company. All access for End Users will require approval from the Partner.

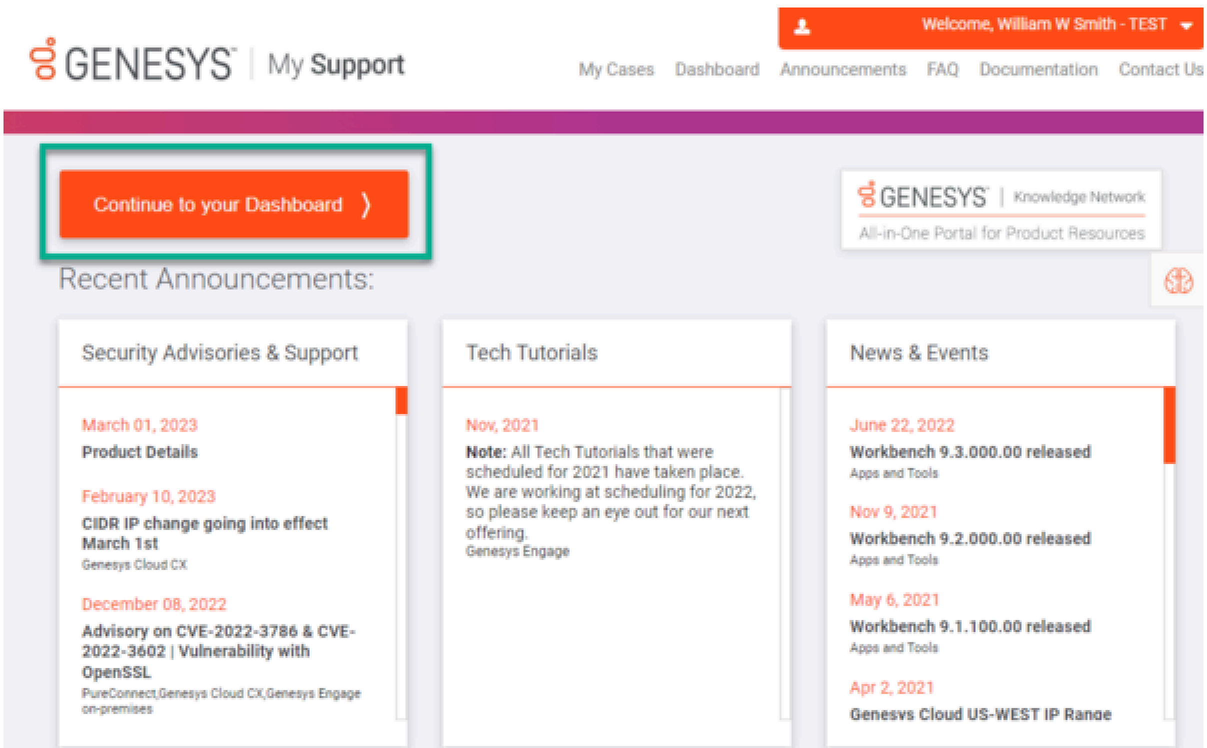
# Cases

**Only [Designated Contacts] are allowed to create a new Case, update/close an existing Case or reopen a Case**.

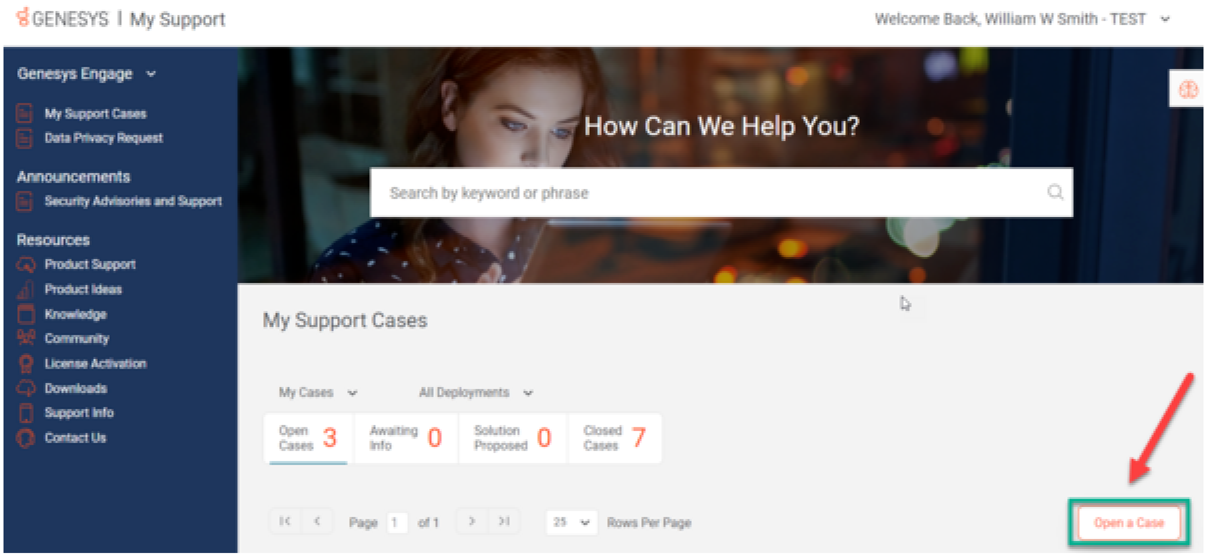
Other employees who work for Genesys direct Customers, Partners, Resellers, or End Users can request Read-Only access to **My Support** to view Cases opened by Designated Contacts on behalf of their company.

1. Login to the My Support Portal.

2. If any announcements pop-up, click **Continue to your Dashboard**:




3. The My Support Portal will automatically open to your **My Support Cases** page. From there, click the **Open Case** button:




4. A new page will open that says, "Hi <your name>, what can we help you solve today?.", fill out the form as follows:

- **Summarize your problem or question:**

  *There's a limit of 1000 characters

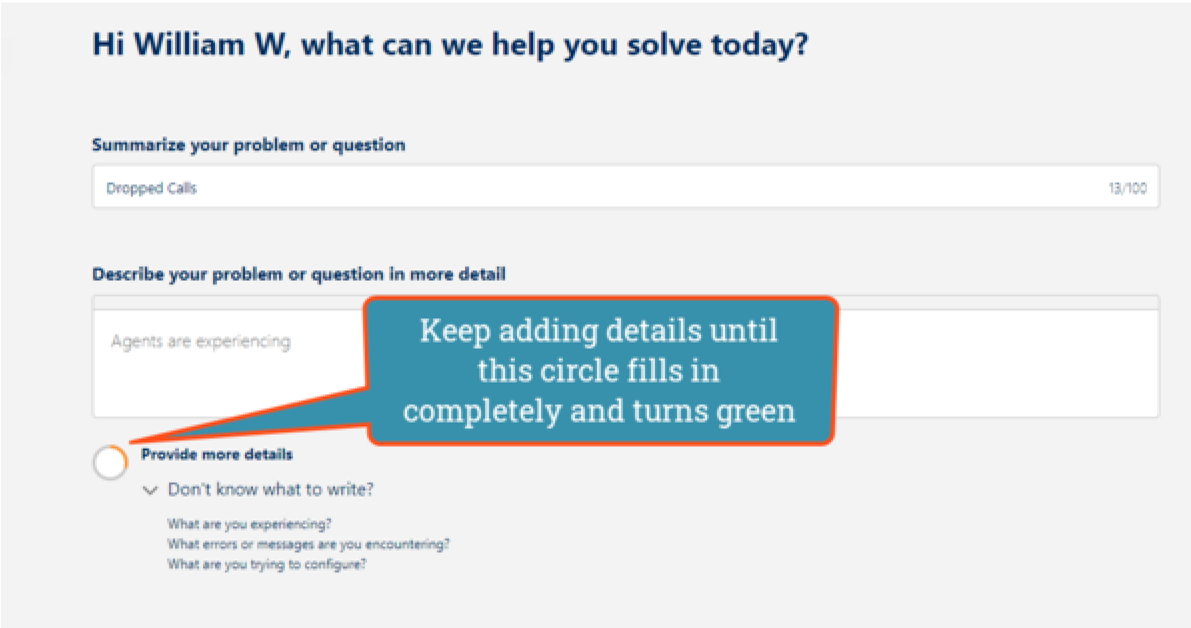
  *Make your summary short, but as specific as possible

- **Describe your problem or question in more detail:**

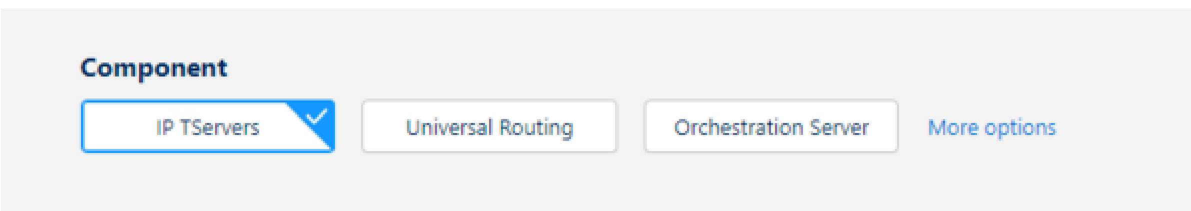
  * Add as many specific details as possible. The more information, the better.

  * After this field, there is a small yellow circle that will fill in as you type more in the description field. After the circle, there will be the words, **Provide more details**. Once you have added a minimum of 10 words, the circle will fill in green and the words will change to "Thank you!"

  * After the circle, there is a header that says, "Don't know what to write?" and provides a list of prompts that will help you think of details you should include in your description of your problem or question.

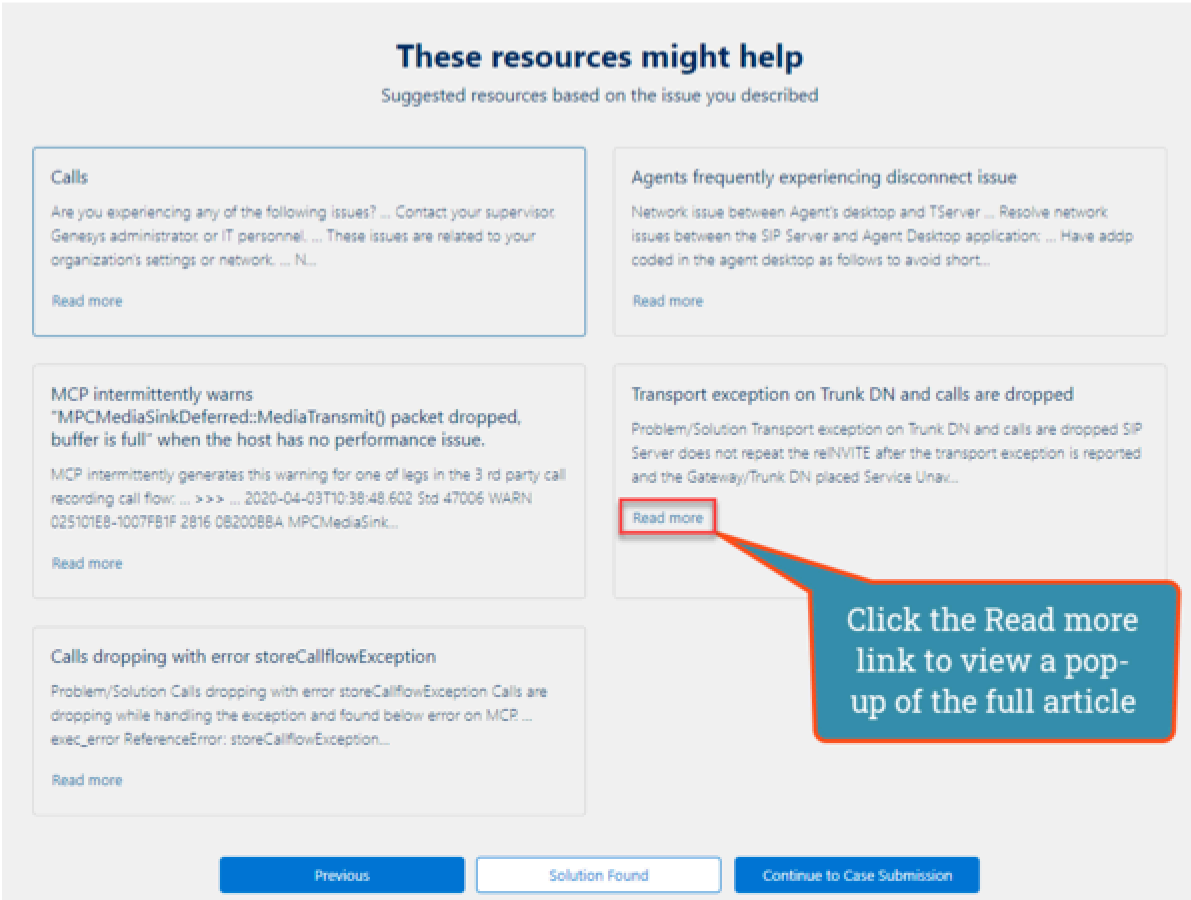



- **Component:** Our AI will auto-select a Component based on the text of summary and description, but if it is incorrect, you can select another by selecting another Component or through **More Options**.




- Click **Next**.
- The next page, titled **These resources might help,** will present you with a selection of titles that include summaries of Knowledge Articles that may solve your problem.

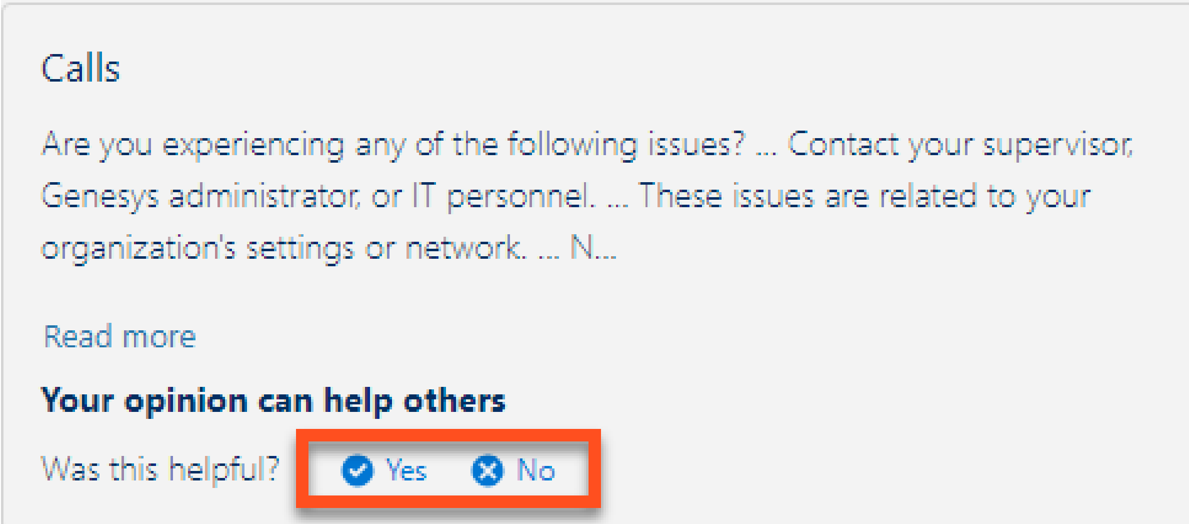
  * If you click **Read more** on the tile, a pop-up will appear showing a preview of the article



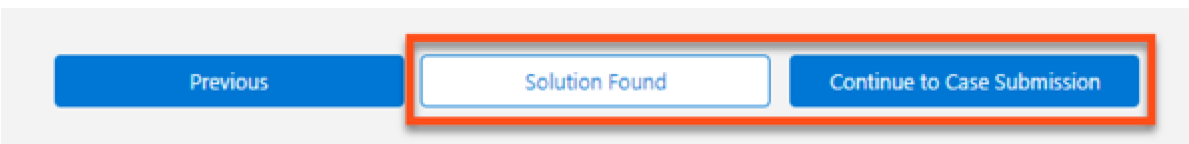

* A link to the article page is included at the beginning of the pop-up


* To close the pop-up, click X near the upper-right corner of the pop-up window

* After closing the pop-up, a message will appear in that article tile asking **"Your opinion can help others. Was this helpful?"** You can select between **Yes** or **No**. Please take the time to select one as this will help the AI learn which articles are helpful for specific inquiries.




* After reviewing possible solutions, scroll to the end of the page and click either **Solution Found** or **Continue to Case Submission**.




* If you click **Solution Found**, a pop-up message will appear saying **"We're glad you found the answer!"**, click Confirm.

* If you click **Continue to Case Submission**, a new form will appear. Fill in the rest of the details to the best of your ability.

# How to Create Cases

1. The **Deployment, Component, Subject,** and **Description** will autofill based on the initial problem or question form.
2. Pick a **Priority** for your Case:

    - **High:** You are able to perform job functions but performance is degraded or limited.
    - **Medium:** Your ability to perform job functions is largely unaffected, but noncritical functions or procedures are unusable or hard to use. A workaround is available.
    - **Low:** The Genesys Component is available and operational; trivial impact to your business operations or you require information or assistance on product capabilities or configuration.
        - NOTE: You may notice that Critical is not a priority option. A Critical Case is one where you are experiencing a severe problem resulting in an inability to perform a critical business function. There is no workaround. If you are experiencing a Critical problem, then submit the Case as a High priority and call Product Support phone support directly: Phone Support

3. Pick an **Implementation Stage: Production** or **UAT** (User Acceptance Testing)
4. If there is a security threat, check the **Is there a security threat?** box
5. Pick a **Case Sub Type:**

    - **Question:** You don't know how to do something
    - **Problem:** Something is broken or not working correctly

6. Enter details on **Business Impact:** How is this case affecting the operation of your business? Can you not do certain tasks? Is it slowing down your call center staff?
7. Enter **# of Agents Affected.**
8. Enter **External Ref #** if you have one.
9. Click **Submit**. This will take you back to the **My Support Cases** page, with a small pop-up in the upper right-hand corner, confirming that you successfully submitted your case. Your case will also appear at the beginning of the **Cases** table on the **My Support Cases** page.

# Managing Cases

The tabbed sections below outlines our support processes and recommended best practices for managing Cases with Genesys Customer Care.

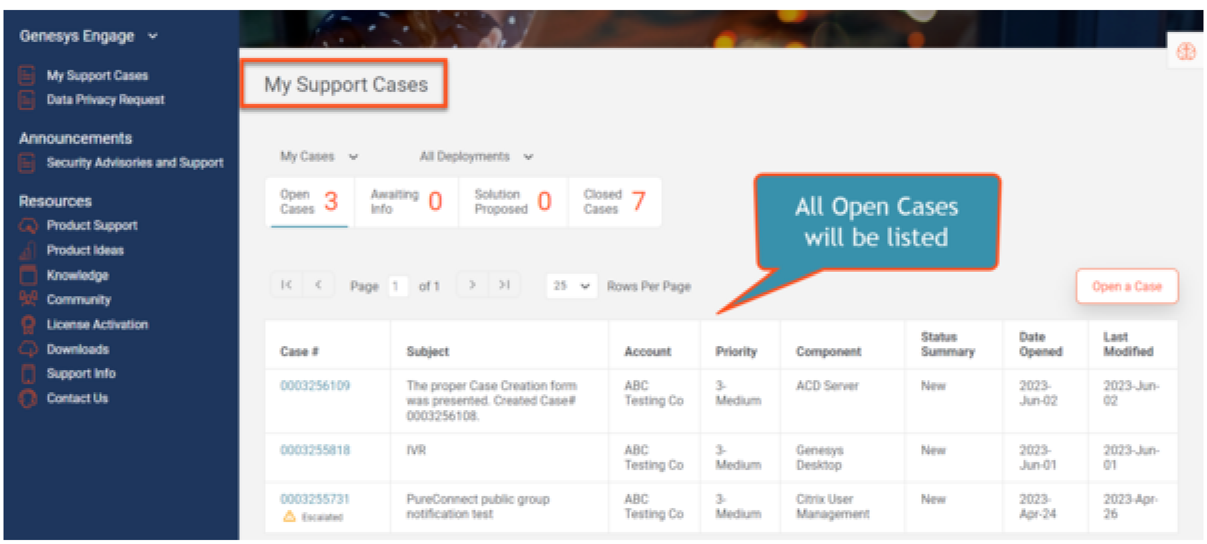
**Only Designated Contacts are allowed to create a new Case, update/close existing Case or reopen a Case**.

Other employees who work for Genesys direct Customers, Partners, Resellers, or End Users can request Read-Only access to **My Support** to view Cases opened by Designated Contacts on behalf of their company.

## How to Find an Open Case

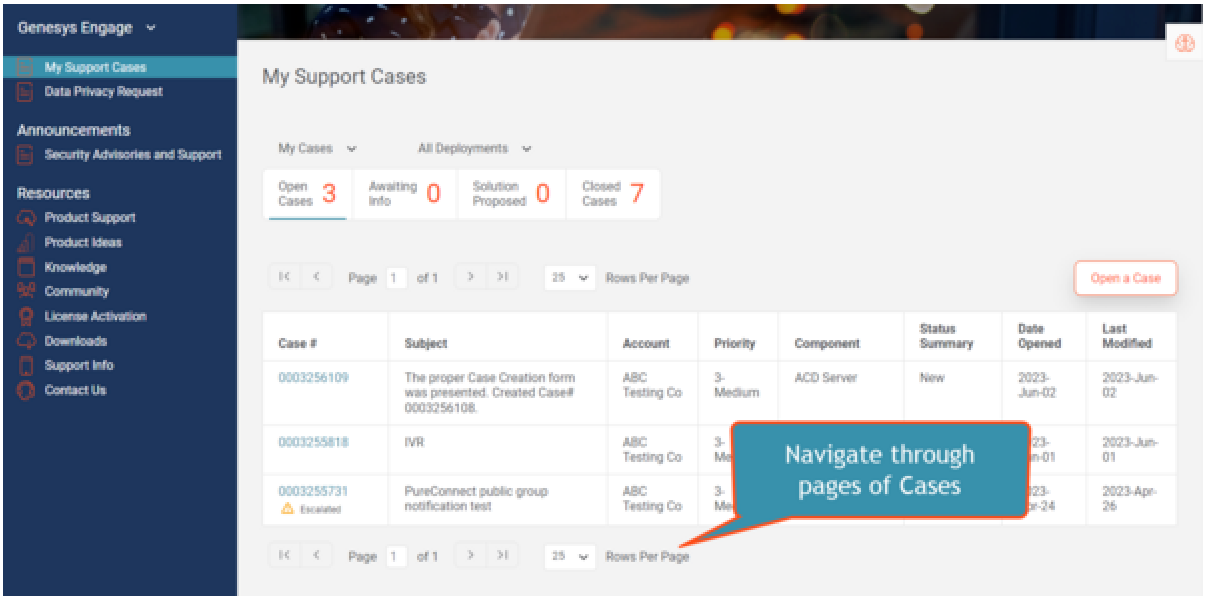
## Finding a Case

The **My Support Cases** page allows you to easily view all Non-Closed cases raised against all Case Types that you are named as the Case Contact. By default, when you first log into the My Support Portal, you will be directed to the **My Support Cases** page.



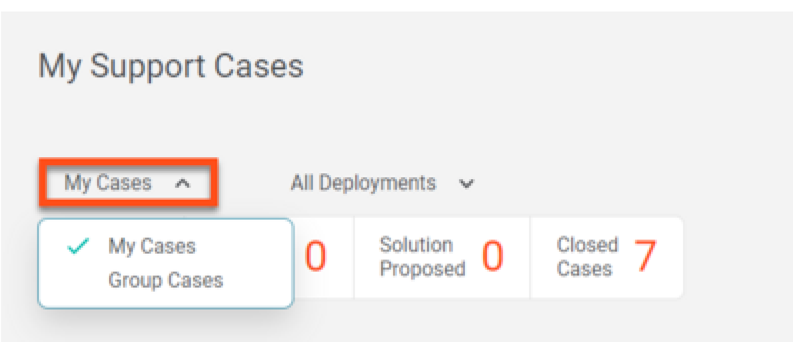
## Navigating through Cases

By default, My Support Cases displays up to 25 cases. If you have more than 25 cases open, you can navigate through them or change the number of cases per page by using the navigation toolbar that appears after your list of open cases.




## View all your Organization's Cases

To view all the Cases open for your organization, click **My Cases** and select **Group Cases** from the drop-down menu.



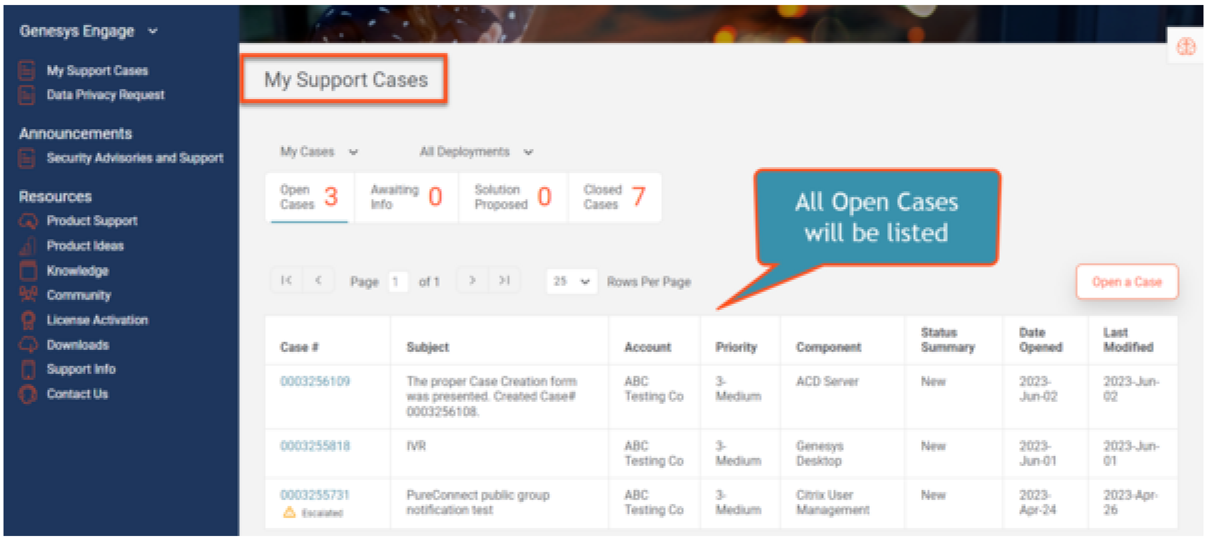

## Updating a Case

# How to Update a Case

You can update a Case on **My Support**, by Email, or by Phone, using the instructions below.

## Updating a Case from My Support Portal

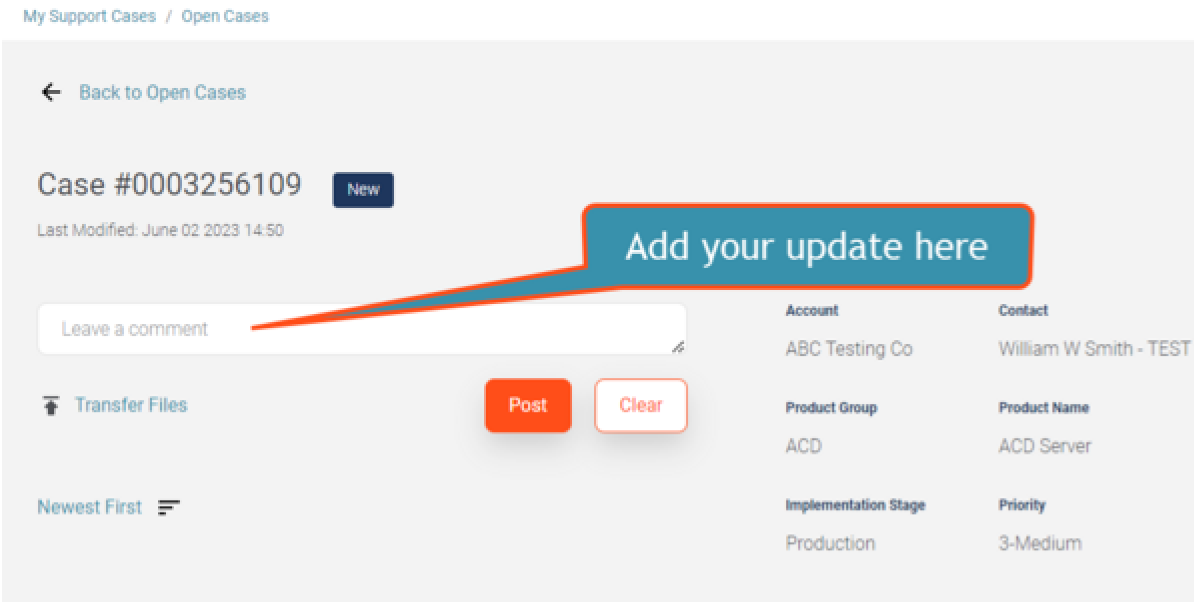
1. Login to My Support Portal using the corporate email listed in your user profile.
2. You will automatically be directed to the My Support Cases page.



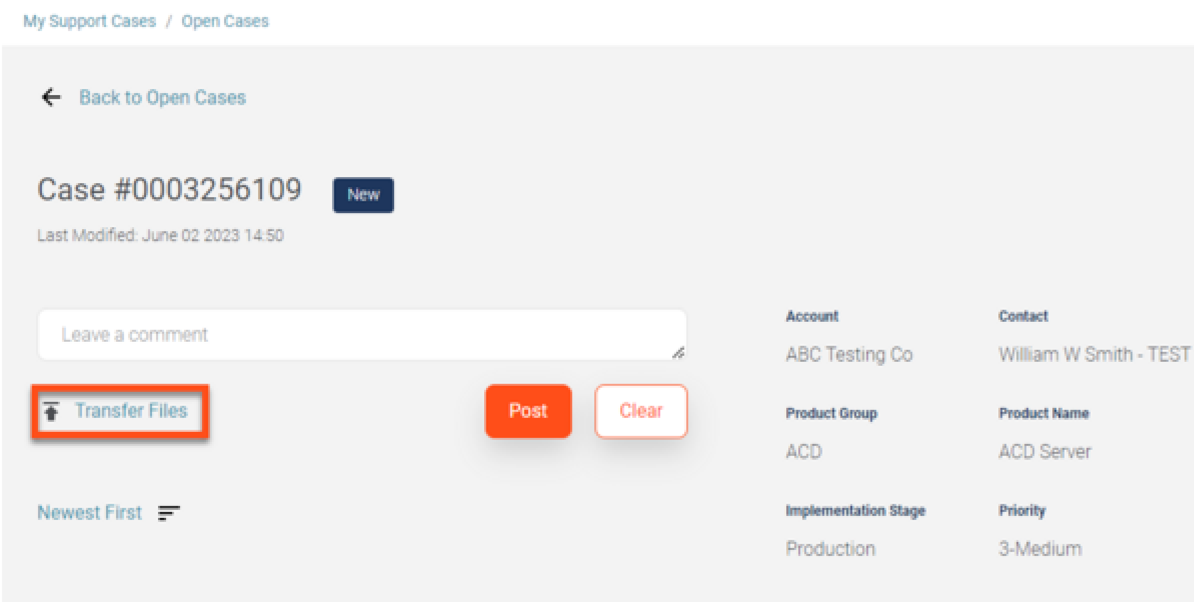

3. Select the Case for which you are providing an update.
4. You can also:

- Enter the Case number in the search box.
- Search using a pre-defined query or by **End User** in the same search box.

5. Select the Case for which you are providing an update.
6. Enter your comment in the Leave a comment field, then select **Post.**




7. Files can be uploaded to the Case using the **Transfer Files** function.




***NOTE***: If the Case is in Awaiting Info or Solution Proposed status, posting an update will also change the Case Status to Open.

You will now see your update(s) in the Case Updates section of the Case.

# Updating a Case by Email

Replying to either an email originating from the Case or an automated Case notification will update the Case automatically. An email originating from a Case includes a special Reference ID, which ties all replies to the Case. If you start a new email and send it to Product Support, it will not link to the case automatically, even if you have specified a case number. Such emails will be processed by the Product Support 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.

# Updating a Case by Phone

A Designated Contact may update a Case by calling Product Support, see the Contact Us page. You may be required to provide your PIN and the 10-digit Case Number.

# Transfer Files to/from Case

# 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

**Important**

Customers and Partners are responsible for purging all personally identifiable information and other sensitive data from the information they share with Genesys when submitting a new Case, when sending Case updates by email, and when submitting log files and other Case updates using the File Transfer Tool, a temporary

> FTP account, and other parts of **My Support**.

## Browser Settings and Other System Requirements

To use the built-in file transfer tool, the following settings must be in place:

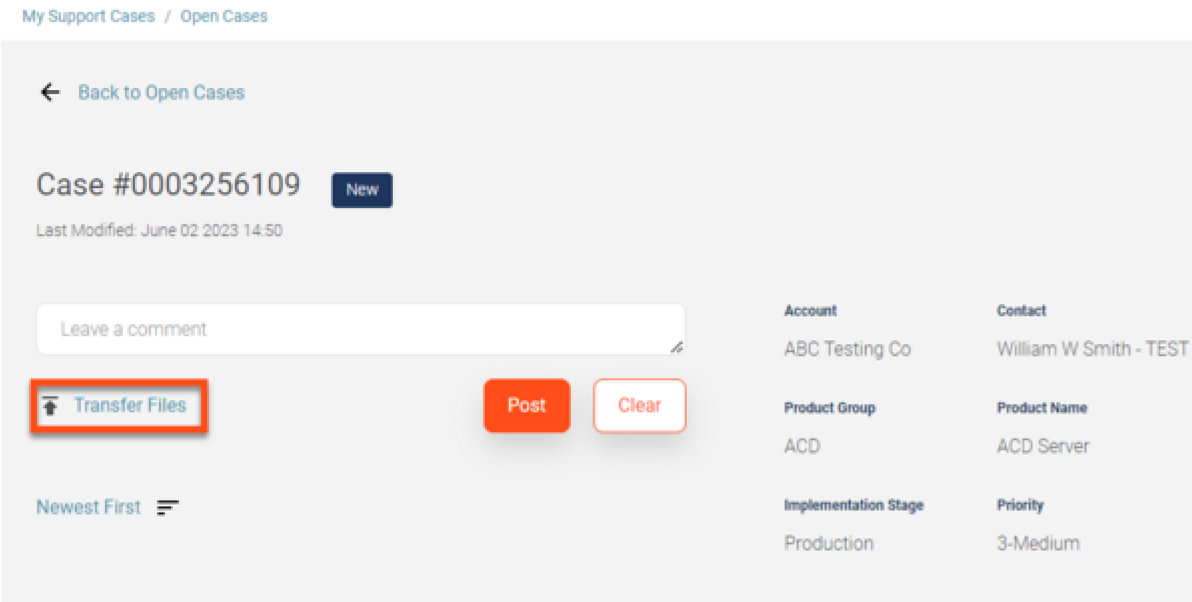
- The browser running the client must have cookies enabled.
- The browser must allow pop-ups from the following servers for the Transfer Files functionality to work properly.
- https://eftgateway-us.genesys.com
- https://eftgateway-emea.genesys.com
- https://eftgateway-apac.genesys.com

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

## How to upload a file to a Case

1. Open the Case on the My Support Portal.
2. Click the **Transfer Files** function.




3. A warning page will appear, which explains that you should not upload regulated, sensitive, or personal data with this tool. Click **Acknowledge.**
4. You can then drag and drop files and folders from your desktop to the File Transfer client. You can also view files you have previously uploaded and view files that have been shared with you.

## 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.

**SFTP clients for Windows:**

- WinSCP
- FileZilla
- CuteFTP
- PSFTP
- Core FTP
- Fire FTP

**SFTP clients for macOS:**

- FileZilla

- ClassicFTP
- Fire FTP
- Secure FTP
- 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.

## Data Retention Policy

Thirty (30) days after a Case is Closed, the data uploaded for that case will be deleted.

## Case Statuses

## Case Status Definitions

Genesys Customer Care uses the following support Case statuses to manage the issue resolution process:

| CASE STATUS | SUBSTATUS | DESCRIPTION |
|---|---|---|
| Open | New | Waiting to be reviewed |
| | Investigation | When Customer Care is researching the Case |
| | Engineering Request | When Customer Care has engaged Engineering to progress the Case |
| | Maintenance Review | When Customer Care is investigating the entitlement and Service Contract |
| | Third Party Pending | Used if we have logged a fault with a Third Party and are waiting for a response |
| Awaiting Information | Information Required From Customer | Used when Customer Care requires additional information from the Customer to advance the Case |
| Solution Proposed | Replied | Used when Customer Care has provided a solution to resolve the Case and customer confirmation is needed to confirm that it solved the problem or answered the question. |
| | Fixed - Software | Used when software has been provided to resolve the Case |

| CASE STATUS | SUBSTATUS | DESCRIPTION |
|---|---|---|
| | Provided | |
| Closed | Resolved | Used when the Case has been closed because the issue was resolved |
| | Cancelled | Used when there is no longer an issue, or Customer Care cannot gather enough information to pursue further |

# Auto Follow-Ups

## 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) 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) 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) 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

# Escalations

If a Case submitted to Product Support needs the engagement of Development, Cloud Operations, or a 3rd party, it may need more time to resolve pending their analysis and findings.

## Criteria for Escalations

# Criteria for Escalations

The following criteria must be met for an escalation request to be approved.

1. **There must be an active Case.** There must be an existing Case open before it can be escalated.

    - **NOTE:** When a Case is closed, the **Escalate Case** button is inactive. To reopen a Case, do so through the My Support Portal or contact Product Support.

2. **Double-check the Case.** Has there been a recent update to the case that you may have missed? Is Product Support waiting on more information from you before they can proceed?

3. **Do not request an escalation based on change in urgency or impact.** If a Case warrants a priority update to High due to greater urgency or wider impact, contact Product Support.

4. **An escalation should not be requested for RCA (Root Cause Analysis) for Cloud Platform outages** unless Product Support has had 5 business days to complete analysis for cloud deployments, per our standard Service Level Targets for RCA delivery. See PureConnect Direct Customer Handbook, PureConnect Partner Handbook, or Cloud CX Handbook.

    - **NOTE:** After service is restored for severity 1 platform-level incidents, Genesys strives to provide a comprehensive RCA document to affected customers within five (5) business days.

5. **Escalations for high-priority Cases need 24 hours since their last update,** and the issue is actively causing significant business impact.

6. **Low-priority Cases are not eligible for escalation.**

    - To change a Case to medium-priority, request the change in the work notes.
    - To change a Case to high-priority, contact Product Support.

## non-FedRAMP Issues

# Critical commercial issues (non-FedRAMP)

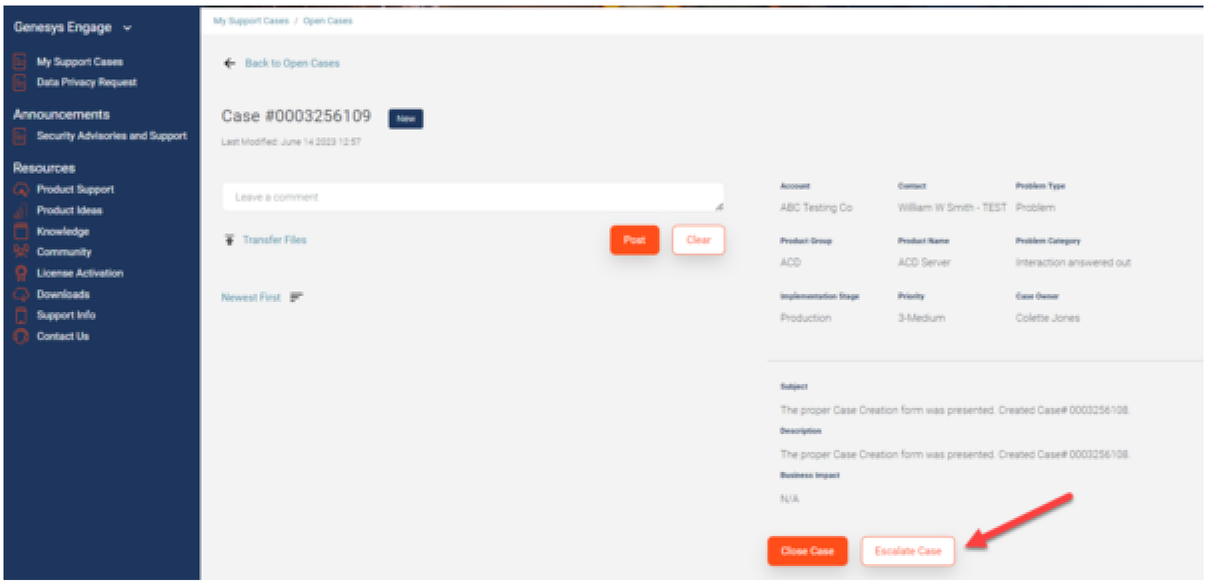
Critical issues, like production down, may need management attention. The support expert assigned to your Case will engage a Product Support Manager.

- **IMPORTANT:** Do not request assistance for urgent issues via email, chat, or web as it leads to a delayed response in resolving your issue.

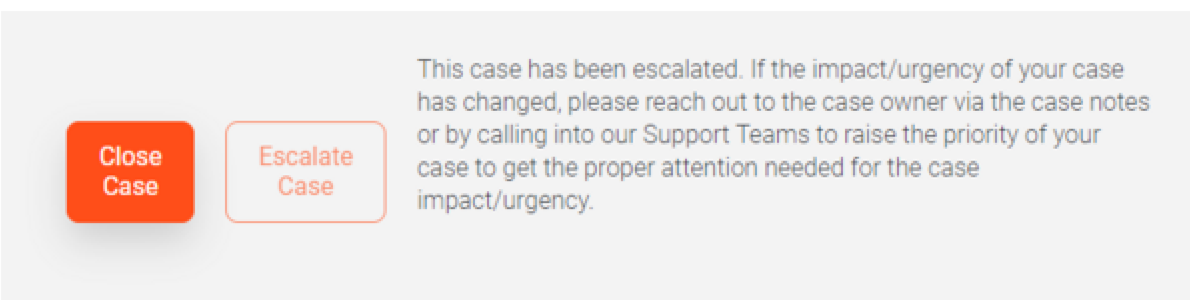
1. Contact Product Support

# Non-critical commercial issues (non-FedRAMP)

1. Select a Case from the My Support Portal
2. In the lower right of the Case page, click **Escalate Case**



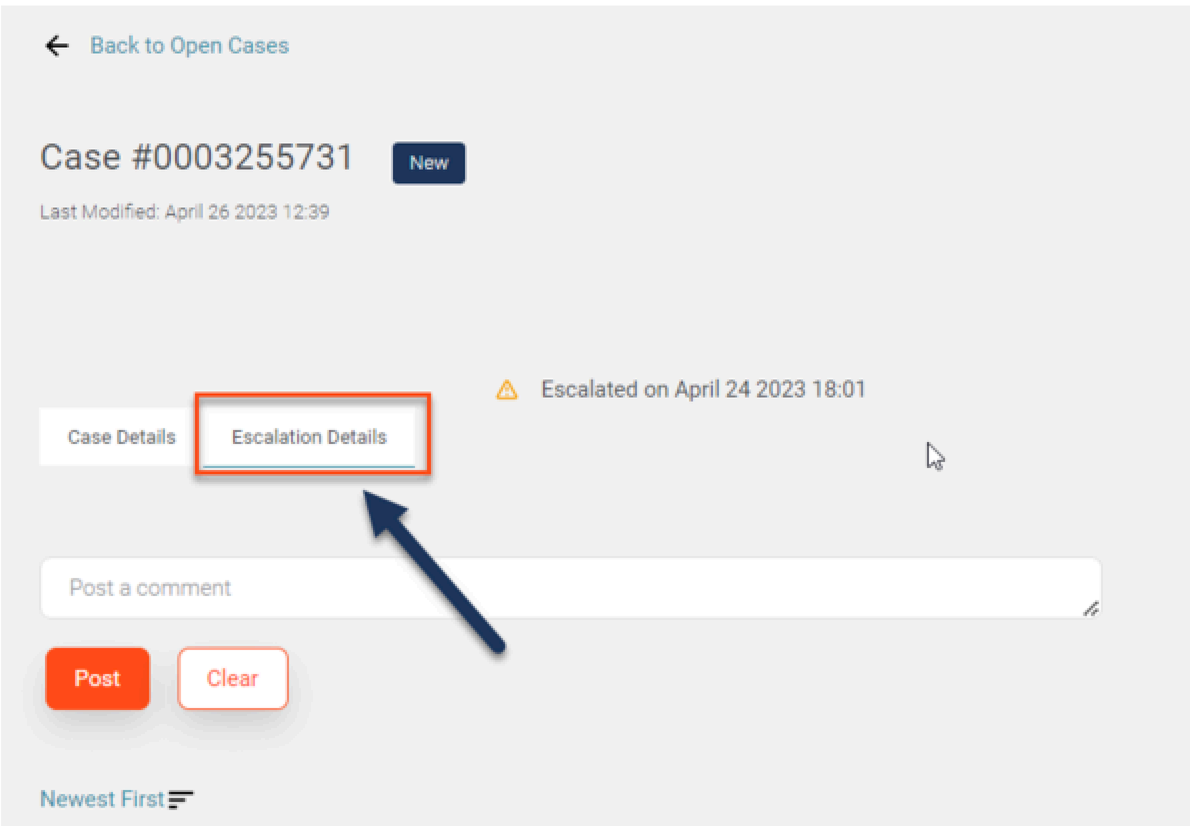

3. If the **Escalate Case** button is unavailable, an open escalation likely exists for the Case



# Communicate directly with an Escalation Owner (non-FedRAMP only)

Once a non-FedRAMP Case is escalated, you can communicate directly with the Owner of the escalation from the **Escalation Details** tab on a Case. The **Case Details** captures the technical aspects of the Case while the **Escalation Details** captures the communication flow of the escalation.

- **IMPORTANT:** Be sure to use the appropriate feed for your updates.




## FedRAMP Cases

# FedRAMP Cloud CX & Engage Cases

FedRAMP Cases can be escalated via the Support Portal site once they have been assigned.

1. From the FedRAMP Support Portal, select a Case.
2. In the lower right of the Case page, click **Escalate Case**.
    - **NOTE:** If the Escalate Case button is unavailable, an open escalation likely exists for the Case.

## Management Process

# Management Process

1. Customer or Partner submits an Escalation Request.

2. The Escalation Owner reviews the request and determines if it meets the Escalation Criteria.

3. The Escalation Owner replies to the request with next steps.

> **NOTE** - If the Escalation Request is invalid, the Escalation Owner will give reasons why and give process information to the requestor.

4. If an escalation request is valid, the Escalation Owner evaluates the situation, prioritizes the escalation by importance and urgency, and works with the engineers to set expectations regarding next steps.

5. Escalation Owner updates the case with all more external communications with the customer or partner regarding the escalation.

# Closing Cases

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.
- The Customer does not respond after three (3) automated follow-ups, refer to the Auto Follow-Up Process in the Managing Cases section.

NOTE: All attached data in a closed Case (including any logs or other customer files) is purged from the **My Support Portal** 30 days after the Case is closed.

# Using the My Support Portal

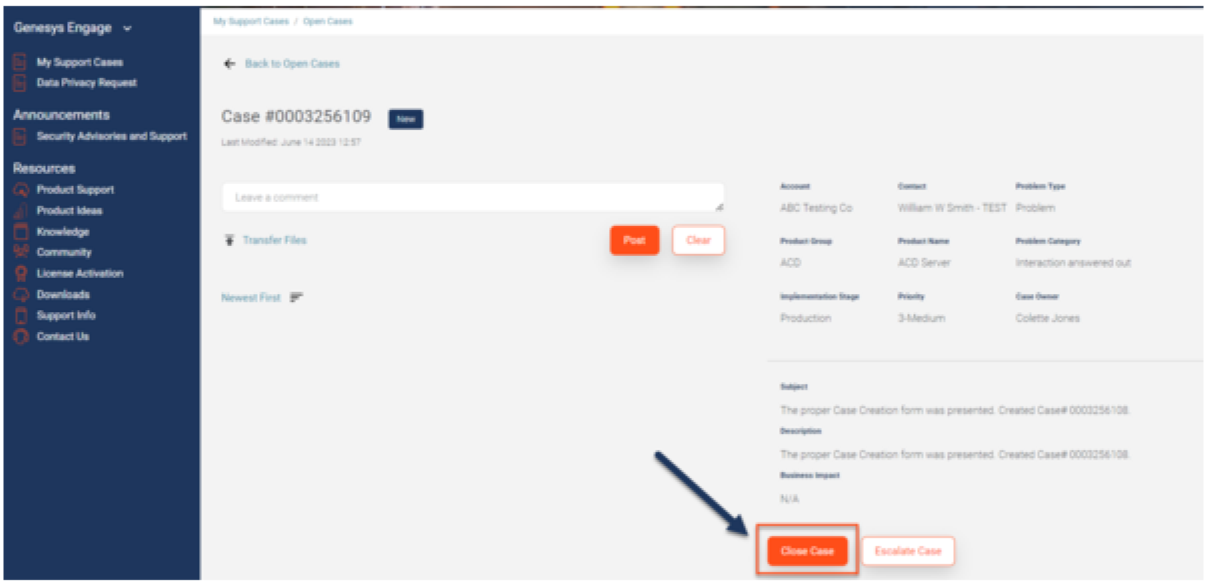
You can close a Case through **My Support** using the following steps:

1. Login to My Support Portal using the corporate email listed in your user profile.

2. You will automatically be directed to the My Support Cases page.

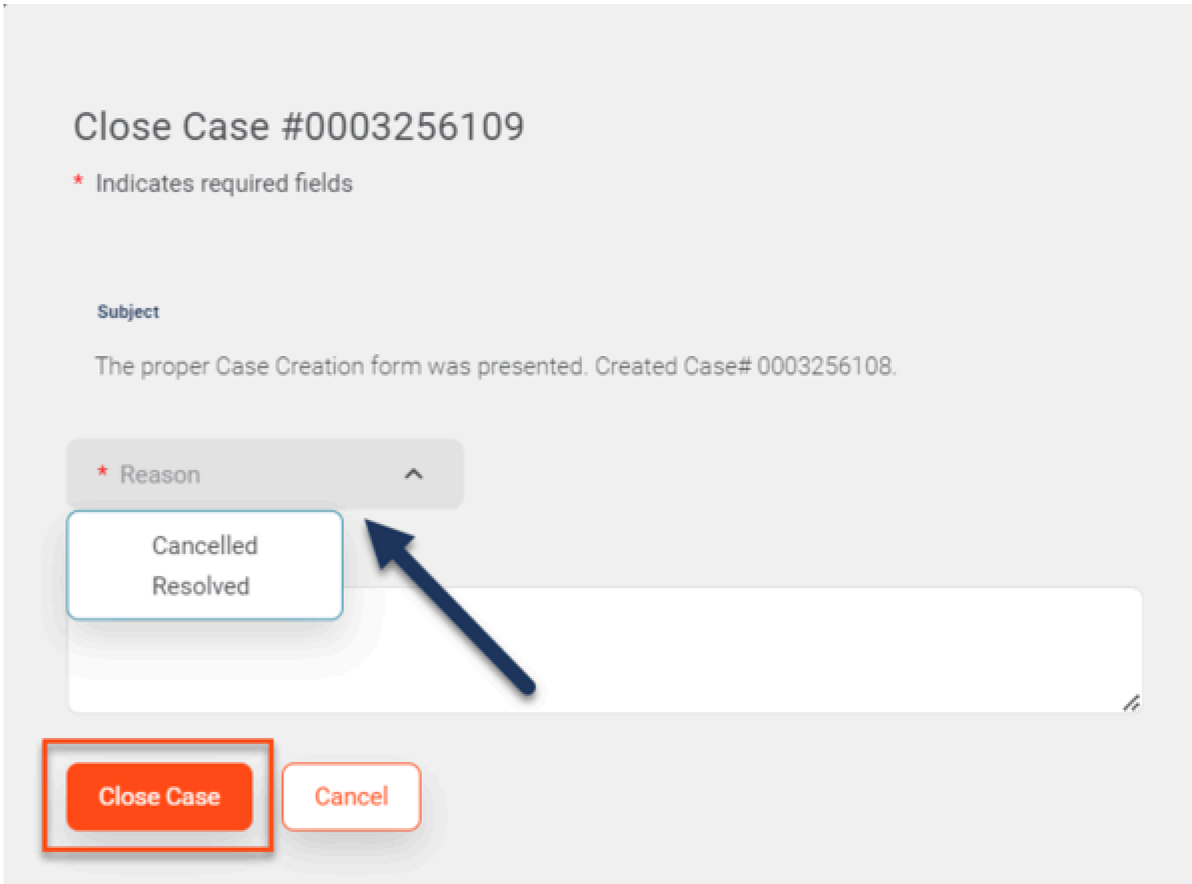
3. Select the Case you want to close.

4. Click the **Close Case** button.




5. Select a Reason (Cancelled or Resolved).

6. Enter your Closure Comment.




7. Select **Close Case**.

# 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 Product Support within ***30 days*** from Case closure. Without this information, the Case will not be reopened. The Customer can reopen a Case by:

**NOTE:**

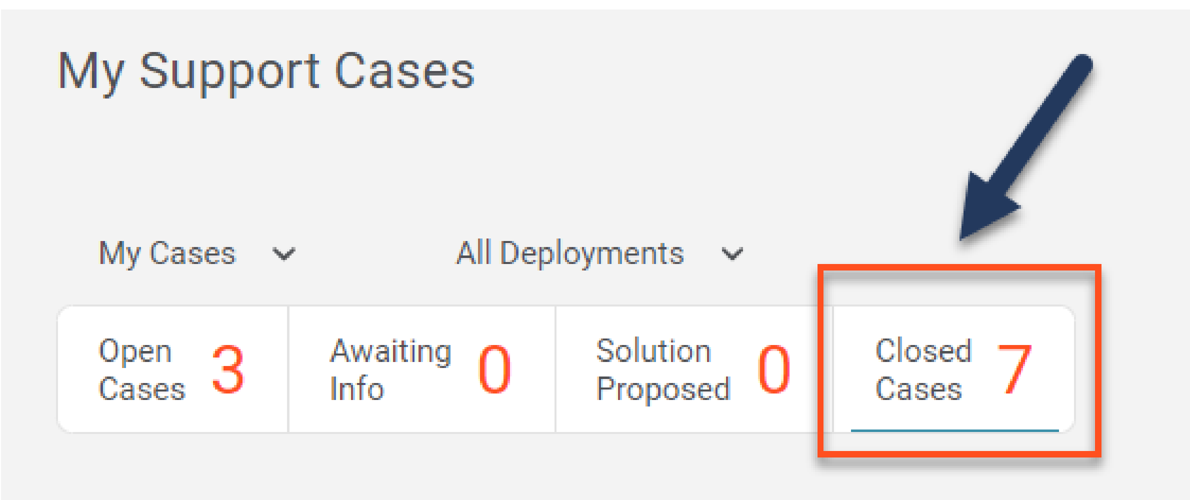
- For Cases closed more than 30 days, contact Product Support, or create a new Case so supporting information can be supplied.
- Ensure you provide supporting information demonstrating the issue has not been resolved.

You have two options to re-open a Case.

## My Support Portal

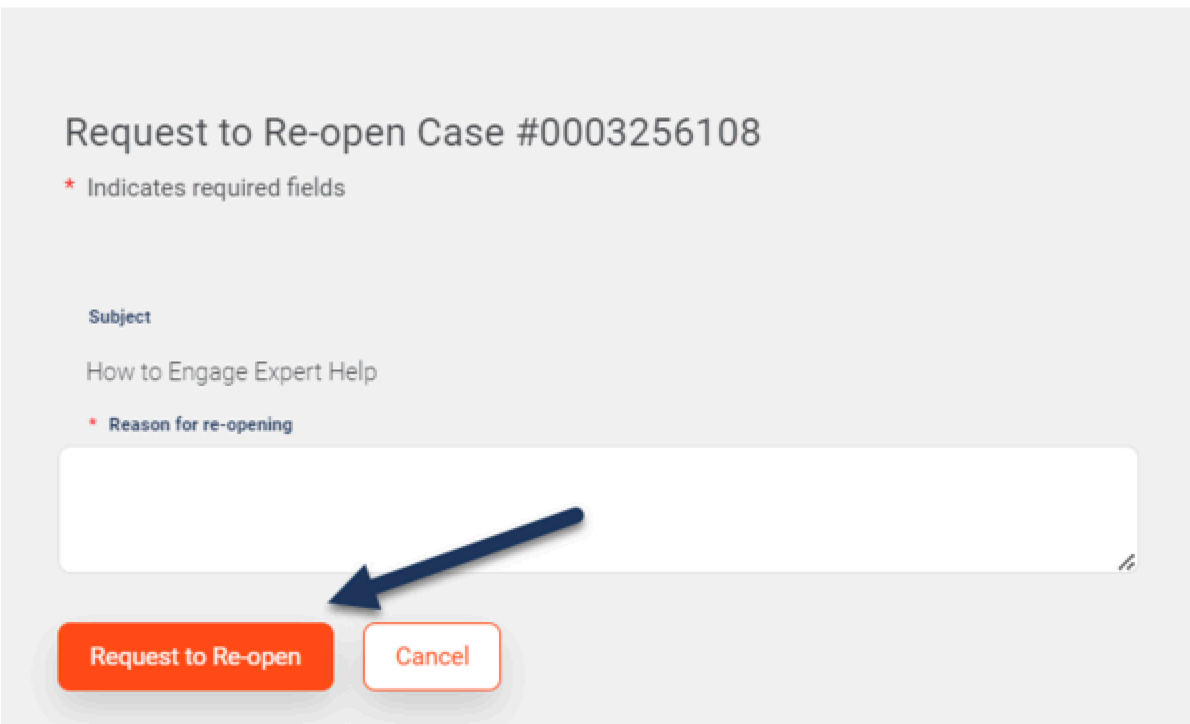
1. Login to the My Support Portal. You will automatically be directed to the My Support Cases page.

2. Click the **Closed Cases** tab.




3. Click on the Case that you want to re-open.
4. From the Case page, you should see a button that says **Request to Re-open**. (If you don't, it is likely because the Case has been closed for more than 30 days. In that circumstance, you will need to contact Product Support or create a new Case.)


5. Supply details in the **Reason for re-opening** description of why you want to re-open the Case.




## Contact Product Support

Call Product Support.

# Admin Cases

## When should I open and Admin Case?

Admin Cases are used for problems or questions related to your My Support account.

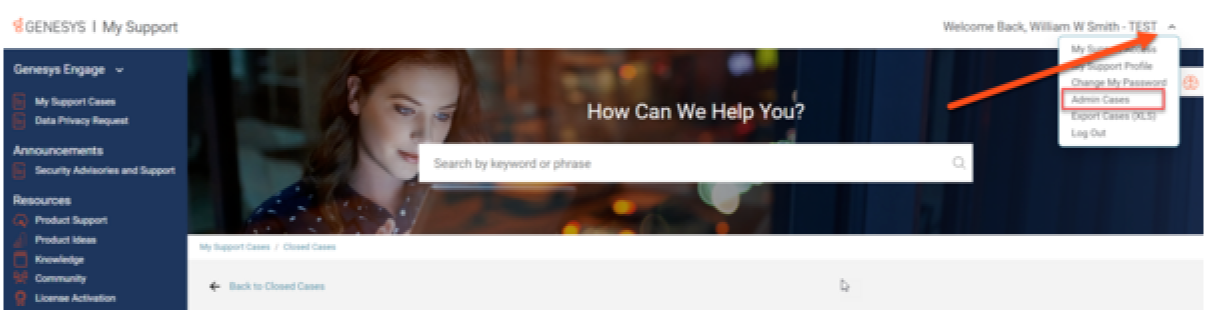
Open an Admin Case for the following reasons:

- Obtaining support access to a particular service contract or Sold To/End User account combination
- **My Support** changes such as adding or removing a contact or updating an email address
- Requesting **My Support** access level changes
- Changes with your Genesys account
- Problems with your licenses
- **My Support** functionality issues
- Product does not show in drop-down list
- File upload/download issues when using "File Transfer" function

## Create an Admin Case

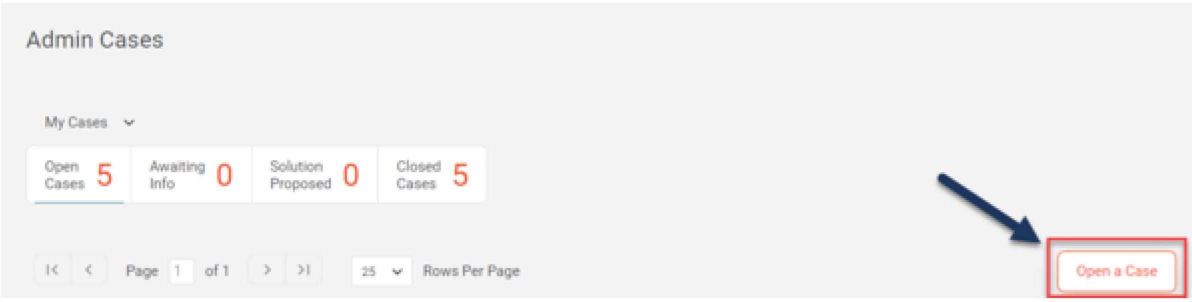
1. Login to the My Support Portal. You will automatically be directed to the My Support Cases page.

2. Click on your name in the upper right-hand corner of the page.




3. Select **Admin Cases** from the drop-down menu.

4. Click the **Open Case** button.




5. Complete the form and click **Submit**.

## Manage Your Admin Cases

1. Follow the steps outlined above on how to access your Admin Cases.

2. Click on the Case you want to manage. From there, you have essentially the same features and abilities as you would with a normal Case.

# Product Ideas Lab

**Submitting an Idea for a new feature**

Genesys encourages your ideas for new product features! Select the appropriate topic tab to learn more.

To submit an Idea for a new product feature, login to Genesys Knowledge Network.

Next, click on **It looks like you own, Genesys Engage**. Then, click on the **Create an Idea** button in the “Product Ideas Lab” widget to access Product Ideas homepage. From the homepage, click on **Add a Product Idea**.

Remember to please provide as many details as you can.

**Idea Submission Statuses Defined**

## Community Review

## Community Review

Upon creation, the status of the Idea will be set to “Community Review." This is where the magic happens... **you** tell **us** what you want us to build:

- You and other customers in the Community will start the conversation by voting and commenting on all Ideas submitted.
- Once an Idea has met the vote threshold, the Idea will be assigned to a Product Manager for review.

## Under PM Review

## Under PM Review

The Community spoke, and we are listening! Product Management and the Engineering teams are reviewing the Idea thoroughly. Upon review completion, Product Management will update the Idea status within **30 business days** to Accepted, Will Not Implement, Feature Already Exists or Currently Not Planned.

## Accepted

### Accepted

Great news! The Idea has been Accepted! Product Management will strategize a development plan with the Engineering teams to ensure the Idea is implemented in the next 12 months. Once that plan is finalized, the Idea status will update to In Development.

## In Development

### In Development

Let’s do this thing! The development strategy and plan has been completed. We have a scheduled release and we are actively building out the Idea. The Idea will remain in this status until it has been Delivered however, we will be posting updates throughout the process.

## Delivered

### Delivered

Congratulations, the Idea is now part of the product!! Please read through the Admin Response for the Release Notes and other information on the implementation.

## Will Not Implement

### Will Not Implement

Thank you for participating in the innovation process at Genesys, however the Idea cannot be implemented within a reasonable amount of time or the Idea does not fit the current product roadmap. Product Management will provide additional details as an Admin Response.

## Currently Not Planned

### Currently Not Planned

This IS a great Idea! However, Product Management does not have resources to dedicate to this effort. Product Management will review this Idea at a later date to see if we can fit in a future roadmap.

## Feature Already Exists

### Feature Already Exists

We know our products can be complex at times. Product Management has identified this Idea as a feature that already exists. The Product Management team will attach documentation as an Admin Response in the Idea to help you utilize the current feature functionality.

## Idea Escalation

### Idea Escalation

For an escalation of an Idea that is in a status **Under PM Review** or **Will Not Implement**, please send the escalation request to Product Ideas Lab Help (IdeasLab.Help@genesys.com).

# Managing Software

The following tabbed sections below address the support processes for managing your Genesys software.

## SW Downloads

## Software Downloads

The Software Downloads functionality on **My Support** allows you to download software (General Availability and Hot Fix releases) for all products for which you have a valid Service Contract.

**Accessing Software Downloads**

***NOTE***: To access Software Downloads, you must be a Designated Contact.

1. Login to **My Support** and go to your dashboard.
2. Click the **Downloads** tile.
3. Select the End User and Sold To Account combination for which you want to download software. (Only Accounts for which you have Designated Contact access will be present in the lookup lists.)
4. Select the applicable download type: Installation Package or CD | DVD Images.
5. You can refine the list of software available for download by filtering on Product first, and then refine further on options like Component, Major Release, Version, O/S, and Language.
6. You can check the box to Include Software Releases under Shipping Control in the list. However, these releases are not available for download. Only the More link will be available for Controlled items, not the Download link. For more information on how to acquire software that falls under shipping control, please select the Ordering Controlled Software tab above.
7. When you click the Download link for an item in the list, you will be asked to accept the Genesys software usage legal Terms and Conditions, including an agreement that you will only distribute the software to the End User for which you downloaded the software.
8. Once the Genesys software usage legal terms are accepted, you will have the ability to download directly from the list of Software available for this End User and Sold To Account combination.

**If You Do Not See a Product that You Want to Download**

If you believe that you have a valid Service Contract for a product that you want to download, but you do not see that product listed in Software Downloads, there are several possible causes:

- You do not have Read-Write access for an active Service Contract for the Sold To, End User, and product that you want to download. If you believe that your access level is incorrect, please contact Customer

Care to investigate and adjust your access.

- You selected the wrong Sold To/End User Account combination. Please make sure you have selected the right Sold To/End User for the product you want to download.
- Something needs to be fixed on your Service Contract. Please contact Customer Care to investigate.
- You do not have licenses or maintenance for that product and will need to purchase it. Work through your normal channels for purchasing Genesys products and services.

**Track the Download History**

You can view your software downloads history by selecting Download History from the Software Downloads menu. The list presented will include all instances when software was downloaded by you and any others who have Designated Contact access for this combination of End User and Sold To Accounts.

# Ordering Controlled Software

## Ordering Controlled Software

Controlled product releases require approval from Product Management before they can be distributed. Therefore, they cannot be downloaded using Software Downloads on **My Support**. If you require a controlled software release, please open a Case with Customer Care.

When creating the case, please:

- Use the **Support** Case type
- Select Sold To and End User Accounts
- Specify the Product, Component, and Version of the software you would like to order
- Provide additional details in the Description section of the Case.

Typically, the following details are expected to be provided in the Case Description:

- Software Release being requested (Component or CD/DVD name and version)
- Operating System that the software is required to run on
- Language if a localized version is required
- Delivery method (FTP or Courier)
- Ship To address (including telephone number and email address) if the delivery method is Courier

- Reason for requesting this particular software release

Your case will be assigned to a product specialist who will confirm which version of the software is the most suitable given your requirements, gather the necessary approvals, and place an order. Once the order if fulfilled, the Case Owner will notify you and let you know how to access the software.

# Interoperability

## Product Interoperability

Genesys maintains a list of core product components that are maintenance-interoperable, which means they are backward-compatible between currently supported releases. For information on interoperable components, see the Genesys Interoperability Guide.

# Temp License File

## Requesting Temporary License Files

License file requests and issues should be raised directly with the appropriate regional Licensing team by sending an email to:

- Americas and APAC (excluding Japan): license@genesys.com
- EMEA: emea.licensing@genesys.com
- Japan: japanorder@genesys.com

Emails will be processed during normal business hours in each region.

Customer Care can issue temporary license files for a Customer in the following cases:

- If a Customer requires an emergency extension or rehosting during non-business hours for a permanent existing license file that was previously issued by the regional Licensing team, the Customer must supply the original license file to Customer Care. Customer Care can then issue a 30-day temporary license file with exactly the same feature set as the original license file.
- If a Customer needs to modify previously issued temporary licenses, Customer Care can issue a 7-day temporary license file with exactly the same feature set as the original license file, and will refer the Customer to the appropriate regional Licensing team for further assistance.

- If the Customer experiences a critical production issue due to a licensing problem (for example, the loss of a license server or corruption of the license file), the Customer must supply the original license file to Customer Care. Customer Care can then issue a 30-day temporary license with exactly the same feature set as the original license file. Customer Care will also follow up with License Management and the Customer to ensure that a normal license file is provided to resolve the issue long term.

***NOTE***: Customer Care cannot issue a temporary license file for demos or testing, and cannot issue an additional extension to a temporary license file previously provided by Customer Care. For these requests, please contact the appropriate regional Licensing team.

# SW Release Types

## Software Release Types

A Genesys **Release** means a version of any Licensed Software containing functional enhancements, modifications, extensions, error corrections or bug fixes. Releases are not provided as part of the Licensed Software unless a Customer has timely paid the applicable Maintenance Fees.

**Major Release** means a Release which comprises a substantial change to the Licensed Software content and fixes to previously determined defects, and may include architectural changes. A Major Release is denoted by a change in the version number to the left of the left most decimal point.

**Minor Release** means a Release which comprises new features, functions, and fixes to previously determined defects, but maintains the same Licensed Software architecture as the Major Release on which it is based. A Minor Release is denoted by a change in the version number to the immediate right of the left most decimal point.

**Maintenance Release** means a Release which comprises fixes to previously determined defects, but does not include new features or functions, or changes to the architectural design of the Licensed Software. A Maintenance Release is any Release that is not a Major or Minor Release

# EOL

## End of Life Policy

Genesys has a published End of Life Policy that governs how end of life is announced and managed for Genesys products and product releases. Genesys also maintains an EOL Life Cycle Table which lists the EOL schedule for all products and releases that have been announced as End of Life.

- Genesys Engage & PureConnect Lifecycle Policy
- End of Life Table

In addition, when End of Life is announced for a product or release, that EOL announcement is published in the Knowledge Base. You can search on "eol" or "end of life" to find all EOL-related documents.

# Third-Party Hardware

In some instances, Genesys may include third-party hardware and/or software as part of a packaged solution such as Business Edition Premise. In these instances, the third-party components supplied by Genesys are generally supported in the same manner as Genesys software by opening a Case on **My Support** or calling Customer Care. If necessary, Genesys will open a corresponding Case with the third-party vendor. For hardware support, and specifically in the case of hardware failure, the RMA process of the third-party will be used and the hardware is not physically handled by Genesys.

**Dell Servers** may be provided by Genesys as part of Business Edition Premise and are backed by a 5-year Dell warranty under a ProSupport agreement including "Next Business Day onsite parts and/or labor dispatch". In this case, the customer may opt to contact Dell directly and will simply need access to the servers and have a valid serial tag number to request assistance. Dell will accept support requests either from Genesys or directly from the customer. Additional details for Dell ProSupport can be found at: http://i.dell.com/sites/doccontent/shared-content/services/en/Documents/prosupport-service-description.pdf

**Audiocodes Gateways** that are provided by Genesys are supported through Genesys only and are backed by an Audiocodes 7x24 ACTS agreement including the "Advance Hardware Replacement" (AHR) option. Genesys will facilitate all interactions with Audiocodes as needed, including assistance in arranging for RMA. Additional details on the Audiocodes ACTS agreement can be found at : http://www.audiocodes.com/ACTS.

Genesys branded IP phones and Audiocodes hardware products, including IP phone, gateways and hardware SBC come with one-year (first year) warranty.

# About PDF Version

For your convenience, Customer Care offers a PDF version of this **Support Processes for On-Premises Licenses** document. You can access the PDF Version from the menu on the left side of this Support Processes document. Click on "PDF Version" to download. This PDF Version is provided for your convenience only, so please be aware of the following:

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- Please read our featured news and announcements where important updates, such as changes to our Support Processes, will be posted on **My Support**.
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# Addendum A

## Genesys Care Offerings

The following are the feature descriptions for **Genesys Business Care**, **Genesys Business Care Plus**, Genesys Premium Care **and** Genesys Flex Care**.**

## Business Care

### Business Care Feature Descriptions

| FEATURES | DESCRIPTION |
|---|---|
| **Software Updates & Upgrades** | Provides access to all Genesys software upgrade/update releases and hot fixes for licensed and compliant software, delivering the latest features, functions, and business benefits of the Genesys Customer Experience Platform and solutions. |
| **7X24 Live Answer Support with Defined Service Level Targets** | Uses a tier-less support model so that each incoming case is immediately assessed for complexity by a Customer Support expert and routed to the right certified professional to manage through restoration. |
| **Remote Diagnostics** | Leverages industry-standard tools to remotely troubleshoot and assist with the investigation, resolution, and root cause processes. |
| **Knowledge Base Access** | Comprehensive, web-based tool available 7X24 leverages thousands of documents to share knowledge, answer questions, communicate best practices, and minimize effort toward identification and resolution of known issues. |
| **Tech Tutorials** | Provides knowledge, significant insights, and interactive Q&A into the more advanced operations of the Genesys portfolio; are delivered multiple times per year and are recorded for replay. |
| **Genesys Community** | Engage with our community and participate in customer forums, post technical questions, and exchange ideas. |
| **Chat with Support Case Owner** | Offers chat via computer or mobile device so that your Designated Contacts can chat directly with Genesys Case Owners about your cases. |
| **Mobile Device Access** | Provides a flexible, fast and convenient way to handle open cases anytime and anywhere including Chat with case owners. Available for iOS and Android™ |
| **Troubleshooting Tools** | **Workbench** - a suite of troubleshooting tools that helps you |

| FEATURES | DESCRIPTION |
| --- | --- |
| | identify and resolve issues faster and provides you with data to better oversee the health of your Genesys environment.<br><br>**Log File Management Tool (LFMT)** - to store application log files and more quickly search and retrieve log files. Also includes scrubbing feature to remove sensitive information before sending log files to Customer Care.<br><br>**Log File Retrieval Service** - allows Customer Care to retrieve log files for you when investigating an open case. (Requires LFMT)<br><br>*Please see the Troubleshooting Tools section for additional options*. |

***Note****: iTunes Store is a trademark of Apple Inc. and Android is a trademark of Google Inc.*

# Business Care Plus

## Business Care Plus Feature Descriptions

| FEATURES<br>Includes all Business Care features plus: | DESCRIPTION |
| --- | --- |
| **Designated Case Management** | Monitors and updates your staff proactively regarding critical cases, participates in weekly case status calls, summarizes case activity on a quarterly basis and learns your environment and business needs to make relevant recommendations. |
| **Enhanced Response Targets** | Delivers accelerated response targets over Business Care service level targets; in addition, for critical, high, and medium severity service issues, response targets are improved by 50%. |
| **Remote Alarm Monitoring with Workbench** | Leverages intellectual property, tools, and best practices to prevent and mitigate issues before they occur. Receive notifications when Genesys detects supported critical and major alarms as well as proactive Customer Care support if needed. |

# Premium Care

## Premium Care Feature Descriptions

| FEATURES<br>Includes all Business Care Plus Features and: | DESCRIPTION |
|---|---|
| **Technical Account Manager (TAM)** | Works as a designated, trusted advisor who establishes and maintains a solid understanding of your business goals, operations and priorities and acts as a main point of contact to drive risk mitigation and issue resolution, advise on training and manage regular reviews to discuss open issues and future project/product feature implementation planning. |
| **Annual Troubleshooting Training Session** | Genesys provides one (1) annual troubleshooting workshop which equates to five (5) free days of Genesys University training for one customer contact. See Troubleshooting Workshops for course descriptions. |
| **Upgrade Advisor** | Provides a review of the software currently installed in the production environment compared with the latest available releases to identify potential issues in current versions, and highlight whether new release capabilities, functions, features and options could be beneficial. |
| **Annual Routing Logic Review** | Identifies and mitigates risks associated with poor performance, invalid logic and inappropriate error handling; provides guidance and best practices regarding routing design, structure and documentation and highlights any logical or other errors found; recommends options to make the logic more flexible, if necessary. |

## Flex Care

## Flex Care Feature Descriptions

**Flex Care** provides additional Support options that you can add to tailor your support needs. Business Care is a requirement for any of these optional services. Each Flex Care option is available individually.

| OPTIONAL OFFERINGS | DESCRIPTION |
|---|---|
| **Technical Account Manager (TAM)** | Works as a designated, trusted advisor who establishes and maintains a solid understanding of your business goals, operations and priorities and acts as a main point of contact to drive risk mitigation and issue resolution, advise on training and manage regular reviews to discuss open issues and future project/product feature implementation planning. |
| **Support Architect (SA)** | Partners as a designated technical expert with your team to achieve platform stability through continuous environment risk analysis, remediation action plans, optimization recommendations, and capacity planning. |

| OPTIONAL OFFERINGS | DESCRIPTION |
|---|---|
| **Remote Alarm Monitoring with Workbench** | Leverages intellectual property, tools, and best practices to prevent and mitigate issues before they occur. Receive notifications when Genesys detects supported critical and major alarms followed by proactive Customer Care support if needed. |
| **Extended Support** | Delivers advice and best effort error investigation and rectification (hot fixes excluded) on the configuration and operation of the end of service (EOS) software. |
| **Custom Application Support** | Delivers support for custom-developed modules, applications, and solutions developed by Genesys and selected partners. |
| **Special Event Support** | Gives your staff greater assurance by providing preferred status attention from select Customer Care resources during special events that could stress your environment. |

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# Troubleshooting Workshops

Genesys University offers the following **Troubleshooting Workshops** designed by Genesys Customer Care specialists for CTI administrators, engineers, and other technical staff involved in the maintenance and troubleshooting of Genesys solutions. Working knowledge of the Genesys server components in a production environment is strongly recommended to get the maximum benefit from the workshop content.

**Customer Interaction Management (CIM) Platform Troubleshooting Workshop** teaches techniques for maintaining and troubleshooting T-Server, Stat Server, Universal Routing Server (URS), and Orchestration Server (ORS), which are all major components of Genesys CIM. You will use specialized technical support tools and utilities to analyze application logs and complete hands-on troubleshooting exercises. The course includes sufficient technical content and details on T- Server, Stat Server, URS, and ORS functionality to allow you to understand how these components operate when functioning normally. Armed with this information, you can then attempt to tackle troubleshooting tasks related to these components.

**Genesys SIP Server Troubleshooting Workshop** teaches techniques for maintaining and troubleshooting SIP Server, Media Server, and Resource Manager, which are all major components of the Genesys SIP Solution. You will use specialized technical support tools and utilities to analyze application logs and complete hands-on troubleshooting exercises. The course includes sufficient technical content and details on SIP Server, Media Server, and Resource Manager functionality to allow you to understand how these components operate when functioning normally. Armed with this information, you can then attempt to tackle troubleshooting tasks related to these components when problems arise.

**Genesys Voice Platform Troubleshooting Workshop** teaches techniques for maintaining and troubleshooting the Genesys Voice Platform. You will learn how to analyze GVP application logs and complete hands-on troubleshooting exercises. This course includes the following topics: GVP component process logs; common GVP issues with 3rd-party recording and call progress analysis; and hierarchical multi- tenant and multi-site GVP deployments. Working knowledge of the GVP server components (such as Resource Manager, Reporting Server and Media Control Platform) in a production environment is strongly recommended to get the maximum benefit from the workshop content.

# Glossary

Genesys Customer Care uses several key concepts to describe our relationships with Customers and Partners. These concepts are defined below.

## Designated Contact

Every Genesys Customer and Partner must identify at least two contacts that will be given special access permissions to interact with Customer Care on behalf of one or more Sold To and End User combinations. Customer Care calls them Designated Contacts. They are the only customer or partner contacts who can open and manage Cases (by phone or web) and download Genesys software.

The Designated Contact policy helps Customer Care safeguard the security of Customer and Partner data and ensure that we are providing service and information about your account to contacts that should be representing your company. Assigning Designated Contacts to work with Customer Care also assists us in making sure that your contacts understand how to work with Customer Care effectively and are informed of critical Customer Care information. There are minimum requirements that must be met to be a Designated Contact. Please review the Designated Contact Requirements and Responsibilities in this document or in the Support Guide for On-Premises Licenses when selecting Designated Contacts for your account.

## Sold To and End User Accounts

The Sold To is the Customer or Partner company that purchased Customer Care maintenance and support services with Genesys. This purchase is legally documented in a Service Contract.

The End User is the company that is using the Genesys products.

With a direct Customer, the same company is both the Sold To and the End User. In this case, the End User has a direct Service Contract with Genesys, and Designated Contacts at that End User can open new Support Cases, view and update their company's Cases, and download software updates for their company.

When the End User has purchased support through a Partner, only the Partner (the Sold To) is allowed to open and update Cases with Customer Care and download software on behalf of the End User. In this case, the End User has an indirect relationship with Genesys because the Partner owns the Service Contract and manages the relationship with Genesys on behalf of the End User.

Generally, the Partner provides initial support to the End User, and opens Cases with Customer Care on behalf of the End User only when the Partner is unable to solve the problem. For End Users who want to track Genesys cases opened on their behalf by their Partner, Customer Care can provide Read-Only access once approval has been granted by the Partner to contacts from the End User company.

## Support Owner

The Support Owner is the company responsible for delivering support to the End User and managing the support interactions with Genesys. For a direct customer, this is the same company as the Sold To or End User. When the End User has purchased support through a Partner, the Support Owner may be the same as the Sold To. However, when the partner has contracted with another company to provide support for an End User, the Support Owner is that third party which is actually providing support. In all cases, the Support Owner is the main company working directly with Genesys Customer Care on behalf of the End User.

## Service Contract

A Service Contract is the legal agreement between Genesys and a Customer or Partner company which entitles that company to receive product upgrades and support services for the Genesys products specified in the Service Contract. The Service Contract is also called a maintenance agreement.

## Contact PIN

When you telephone Customer Care, you may need to identify yourself by a PIN. This is a personal identification number that is assigned to every Customer and Partner contact. This helps Customer Care identify you, which can help you get in touch with a skilled Customer Care analyst more quickly. Your PIN may be requested whether you are being routed through voice menus or are talking directly with an analyst.

Since all Contacts have a PIN, we will still verify whether or not you are a Designated Contact when you call in to open a Case. Only Designated Contacts will be allowed to open a new Case or work on an existing Case.

PINs will not be distributed by email for security reasons. You can find your PIN in your profile. After you login to **My Support**, click the Contact Information link under My Profile at the top left. If you do not remember your password, enter your login (your corporate email address) and click the "Forgot your password" link.