For internal use only

AlienVault

Technical Support Handbook

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Soft Skills

Soft skills are essentially a collection of positive social, communication, and self-management mannerisms you can develop and employ at work to help you interface properly, professionally and courteously with Co-workers and Customers. Examples of Soft Skills include:

- Performing your job with Honesty and Integrity
- Acting Responsibly and Ethically
- Displaying High Self-Esteem and a Positive Attitude
- Being and Remaining Motivated when serving our Customers and Colleagues
- Thinking, Listening and Communicating Effectively and Efficiently

Soft Skill Tools to Help You Succeed

Active Listening. Active listening is a structured way of listening and responding to others. It focuses attention on the speaker. Being an active listener requires focus; you should ask questions and paraphrase throughout the conversation to ensure you understand what is being communicated.

Effective Communication. Communication is expressing yourself well; in email, in person, and on the phone.

Consistent Follow-through. Follow through builds trust, respect, and confidence within your team and with customers. A successful employee learns that finishing what they start – even if that means handing a case off to another team or escalating a case - is essential to a smooth-running operation.

Phone Conversations with Customers

The following scripts should be used when having conversations with customers.

- **Answering Your Phone**
  "Hello, this is [Your Name] with AlienVault Technical Support. How may I help you today?"
- **Taking a call from the call queue**
  "Hello, this is [Your Name] with AlienVault Technical Support. I apologize for the wait. How may I help you today?"
- **Calling a customer directly**
  "Hello, this is [Your Name] calling from AlienVault Technical Support in reference to case number [Case Number]. How may I help you today?"

While on the phone with a customer you should be aware of your surroundings and your actions. Sometimes customer support that is perceived as rude is not intentional but rather the result of carelessness on your behalf. Keep the following in mind when speaking with a customer to ensure you provide the best support possible.

- Ensure you have a positive and friendly demeanor. Don't let your mood or attitude carry over into your conversation with a customer. Don't forget to use the words "please", "thank you", and "you're welcome" during your conversation.
- Be aware of local noise while you are on a call, don't let it become a distraction to your customer. This includes side conversations, cell phone ringers, paper rustling, laughing, etc.
- Be accountable for your own noise as well. Don't put calls on speaker, don't stand up and project your call into others cubes, don't raise your voice to make a point or compensate for others' noise.
- Be confident in your answers; wavering or providing one word answers can come across as rude or incompetent. Communicate using common terms, descriptions, and analogies.

Attendance

Reporting to Work

If you are running late, you are expected to call or email a Technical Support supervisor or manager before your scheduled start time to let them know when you will be in. The same applies if you are calling in sick or taking Vacation. Additional notice is appreciated whenever possible, at least 2 weeks in advance for Vacations.

Smoking

AlienVault, in compliance with state and/or local laws, is a smoke-free work environment. Therefore, no smoking is permitted in any AlienVault buildings including parking garages and covered parking lots, or in common areas such as lobbies, restrooms, stairwells, and elevators.

Preparing for Meetings

All Technical Support representatives are expected to attend mandatory meetings, except in instances where getting off the phone is impossible. To minimize such instances, you are expected to stay off the phone for the ten minutes leading up to a scheduled meeting. Meeting attendance is important and missing too many meetings may result in disciplinary action.

Common Terms and Definitions

The following are common terms used internally and with AlienVault customers. It is important to know these terms.

Defects

A defect is when the behavior of the system is contrary to the expected results. This encompasses both core functionality and user interface elements

Idea

Feedback on how to change or improve an existing feature of the system, or adding on a new feature.

LightSpeed Replacement (LSR)

If the Company confirms a material defect with the Hardware, AlienVault will ship replacement Hardware of like or better quality within two (2) business days. Customer is responsible for returning the defective Hardware to AlienVault within 14 days after receiving the replacement Hardware.

Trial

A Trial is an AlienVault product available to customers on a 30-day free trial.

Basic Support

Currently, Basic Support is support 8x5, 8 hours a day 5 days a week in Central European Time and Pacific Standards Time (00:01 PST – 17:00 PST)

Hardware Appliance

A hardware appliance is an AlienVault software image installed on AlienVault approved hardware. Approved or supported hardware is purchased from an AlienVault approved vendor who preinstalls the AV software image and ships the appliance to the AlienVault Customer. Our hardware currently has a 12-digit serial number beginning with a two (2) or a three (3). If there are any letters, or id the number is not 12-digits long, this is not supported AlienVault hardware.

Virtual Appliance

A virtual appliance is a software image designed to run inside a virtual machine via VMware. Virtual appliances enable customers to use the same technologies available in the AlienVault hardware appliance based solutions. A Key/License number will be associated and applied to the unit after downloading the OVF.

Customer Portal

The customer portal is the front-end login to all AlienVault cloud based services. Customers can access the portal from our main website using the Customer Login button. Once the customer enters the portal they can connect to their case history and Customer-facing solutions.

Online Community (Forum)

AlienVault's online community is a forum for users to interact and exchange information regarding AlienVault appliances and services. The AlienVault Online Community is located at: http://www.alienvault.com/forums.

Technical Response Team (TRT)

Technical Response Team (TRT) is comprised of 4 – 5 Technical Support Engineers with subject matter expertise with all AV components.

Technical Support Engineer (TSE)

Technical Support Engineer is the person providing support on AlienVault components

MSSP Partner

AlienVault has forged strategic partnerships with other technology companies creating, Managed Security Service Providers (MSSP) to help grow our business and theirs.

AlienVault Certification

The AlienVault Training /Certification (https://alienvault.com/training) is designed to help customers, partners and employees support AlienVault products through instructor led, webinar, online product training courses and associated certification examinations.

Types of Support Calls

The goal of the Contact Center is to provide efficient and effective World Class Product Support to AlienVault customers. Contact Center agents must ensure customer calls are routed to the appropriate AlienVault technicians to ensure requests are handled in the most expeditious manner. The vast majority of support cases are from customers and Partners looking for Technical Support. Unless stated differently in the descriptions provided for each call type below, all cases should be created and handled as described in Case Creation section.

Sales Related Calls

All pre-sales (soon-to-be customer) questions, no matter how technical, are to be directed to Sales. Send email to sales@alienvault.com for all pre-sales requests received through the support queue. We only create cases for customers who have already purchased AlienVault USM solution. Pre-sales (Leads) customers that have not yet purchased the Alienvault USM solution, but have downloaded the trial, are to be re-directed to the "Trial Support" queue.

Renewal Requests

If a customer needs to renew their Support Contract, they should be transferred directly to the Renewals Team without creating a case. If the customer has an existing RMA case and wants to purchase LSR, create a case and transfer the call to the Renewals Manager.

RMA Requests

When a customer asks for a replacement unit, a case should be created so a TSE can look into this further. If/When the TSE believes the hardware to be defective; troubling shooting will be done using the steps in the section "Replacing an Entire AlienVault System (RMA)". No troubleshooting situation will warrant opening a Hardware appliance; this will void the customer's LSR. If the TSE believes there to be a hardware issue after troubleshooting, they should contact MBX Technical Support at support@mbx.com or 888.440.1617.
Only MBX technicians can verify an RMA is required and an RMA will not be processed without the MBX technician confirmation attached to the case.

Transfers from Other Departments

If an AlienVault employee contacts Technical Support because they need immediate assistance with a customer, that support case should be given a higher priority (P1 or P2). If no case exists, create one immediately.

Free Trial Accounts

AlienVault provides 30 day free trials of our product. When someone signs up for the free service from our website, a Lead is automatically created in SalesForce and an email is sent to the contact with instructions on enabling their Trial Version. If someone calls in for support of a Trial Account or Lead, a case should be created and placed in the "Trial Support" queue.

AlienVault Certification & Training

AlienVault customers and partners may call Technical Support inquiring about AlienVault Certification & Training. Pass them to Sales to go over available options.

Non-Customers Asking for Support

AlienVault only provides support for first-party customers (those who bought their AlienvVault product directly from AlienVault) or second-party customers (those who bought their AlienVault product directly from an authorized AlienVault partner). If you get a customer on the phone (say, for a password reset) and they are not listed in Salesforce as a contact, but show as a Lead, create a case and place in the "Trial Support" queue. If they do not have a trial and are using the OSSIM / OTX direct them to the forum (https://www.alienvault.com/forums).

Managing Cases

Case Priorities

As cases are created, it is the Support Center Agent's responsibility to assign a priority to each case based on feedback from the customer. The case priority should never be communicated to a customer; customers should have no reason to believe we assign priorities to any of their cases. Selecting an appropriate priority for each case is important because it will determine the order in which customer calls are returned. The most urgent priority is a P1, and the least urgent is a P4. Below are some guidelines to help you determine the priority of cases as you create them:

- P1 cases are those in which the issue has a crippling effect on the customer's business (i.e. system is down). This means AlienVault is not working or the issue prevents operation of the system has resulted in a critical impact on business operations.

  Priority 1 Examples
  - System Lock up
  - Unable to Boot
  - No Network Connectivity

- P2 cases are those in which there is significant reduction in the specified functionality of the system.

  Priority 2 (Severe Degradation) Examples
  - Web Interface Inaccessible
  - Network Connectivity Down
  - Events Not Being Received

- P3 cases are those in which there is minor reduction in specified functionality, but does not impede system operation in a normal manner. The operational performance of a customer's network is impaired while most business operations remain functional. AlienVault appears to be working, but seems to be struggling to get the job done.

  Priority 3 (Impaired) Examples
  - Directives Not Working
  - Policies Not Firing
  - Reports Inaccurate
  - System Latency

- P4 cases are minor defects and errors that do not impede system operations in a normal manner. Enhancement Idea requests are also categorized as priority 4, as are initial setup and configuration questions.

  Priority 4 (Information) Examples
  - Initial setup or configuration questions.
  - Reporting or statistics problems or questions.
  - Enhancement Idea requests.
  - Customer requests an update on an existing defect.

A case's priority is no reason to wait to contact the customer; an untouched case should always be started as soon as possible. An important part of a Technical Support engineer's job is to call cases in an appropriate order. Given a case's age, priority, and progress, you should call the oldest, highest priority cases that you predict will take the least amount of time to close before moving on to newer, less urgent, potentially longer cases.

Contact Center

Once you have picked up a call you can use the following scripts to communicate with customers:

"Thank you for calling AlienVault, my name is {contact center agent name}, can I get your first and last name or an existing case number."

"Can I get a brief description of the issue or question that you have?"

"Please give me a moment while I verify your information and create your case."

"I have your case number; please let me know when you are ready to write it down."

Callback Times

If you are assigned a case that requires you to call the customer, take a moment to review their recent case history before calling. If a customer has called within the past week, you should review their case information to familiarize yourself with their issues. If the customer is calling about a recurring issue, reading their case history will allow you to be prepared to help them and alleviate having customers repeat themselves multiple times. You should also check the Parent Case field, located in the Case Description section, to see if any related cases are referenced and review the Parent Case in detail before calling the customer.

Handling Scheduled Callbacks & GoToMeetings

Customers may contact AlienVault Support and request a scheduled time to work on their issue. When this occurs, the Contact Center Agent creates a new case with the following details:

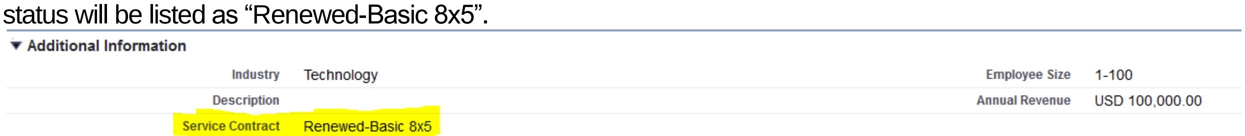
- The subject of the case specifies the requested date and time as "** 'Date and Time' 'Timezone' , Subject".
    - Example: **Call Back MM/DD HH:MM PST** Sample Subject
- Select the case reason that best reflects the issue for that case.

If the customer is busy when you attempt to contact him/her and they request to reschedule the appointment, you should update the subject with the newly specified date and time. If you need to have the case reassigned, update the Owner to the "Support" queue and place a note in the case stating why the case needs to be reassigned.

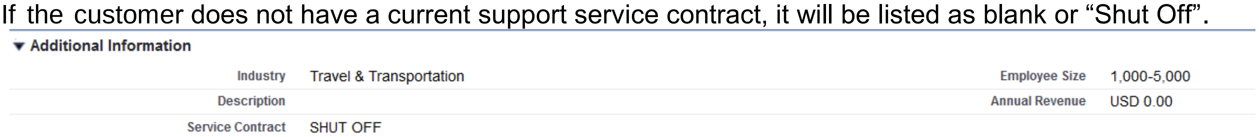
Checking Support Status

After receiving a customer's company name, you should look up their support status.

1. The support status should be shown in the "Additional Information" area under "Service Contract". Current support status will be listed as "Renewed-Basic 8x5".



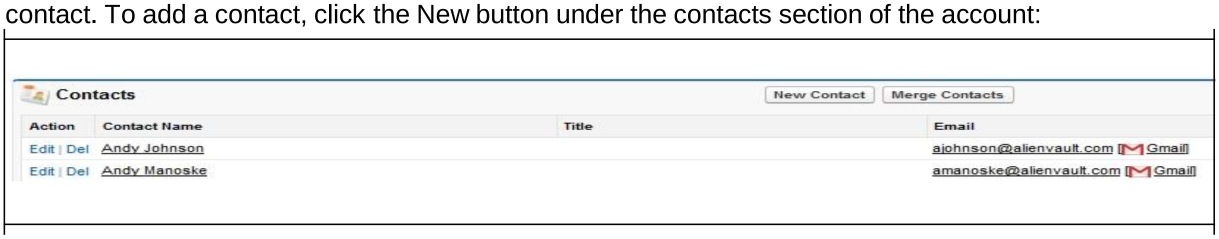
2. If the customer does not have a current support service contract, it will be listed as blank or "Shut Off".



Customers with no support contract can be transferred to Sales to discuss their Support options.

Contact Creation

Whether the account already existed or you created a new one, you must make sure the customer's contact information is associated with their account. If they are not already listed under the account, you must add them as a contact. To add a contact, click the New button under the contacts section of the account:



Enter the customer's first and last name. Make sure to verify the spelling. Next, enter their email address. Again, make sure to verify the spelling (an incorrect email address may prevent us from contacting them). The domain name of their email address must match the company's domain. Lastly, you must enter their phone number. You should ask something like "What is the best number for the technician to call when contacting you?" Remember to click the Save button when you are finished entering the contact's email address so the information will be saved with the account.

Verifying New Contacts
When you add a new contact to an existing account, you must contact the company (using the account phone number or email the main point of contact for the Account) and ask for the new contact, to confirm their employment with the company. Once you have verified that they are a legitimate employee associated with the customer they should be added as a contact for the account. You should also document the name of the person you spoke with, along with the date, within the description field (Example: Contact verified by John Doe on 1/1/2014). This security check must be done every time a new contact is added to prevent unauthorized contacts from accessing that company's AlienVault Appliance.

3rd Party Contacts (Partners/Re-Sellers)
When you add a new contact to an existing account that is contracted out by the end user, you must contact the end user company (using the account phone number or email the main point of contact for the Account) and ask if they can confirm their permissions to have access to their appliance. You should also document the name of the person you spoke with, along with the date, within the description field (Example: Contact verified by John Doe on 1/1/2014). Place the title of the contact as a contractor from reseller or contract company name (Example: Technician from ABC Company). This security check must be done every time a new contact is added to prevent unauthorized contacts from accessing that company's AlienVault

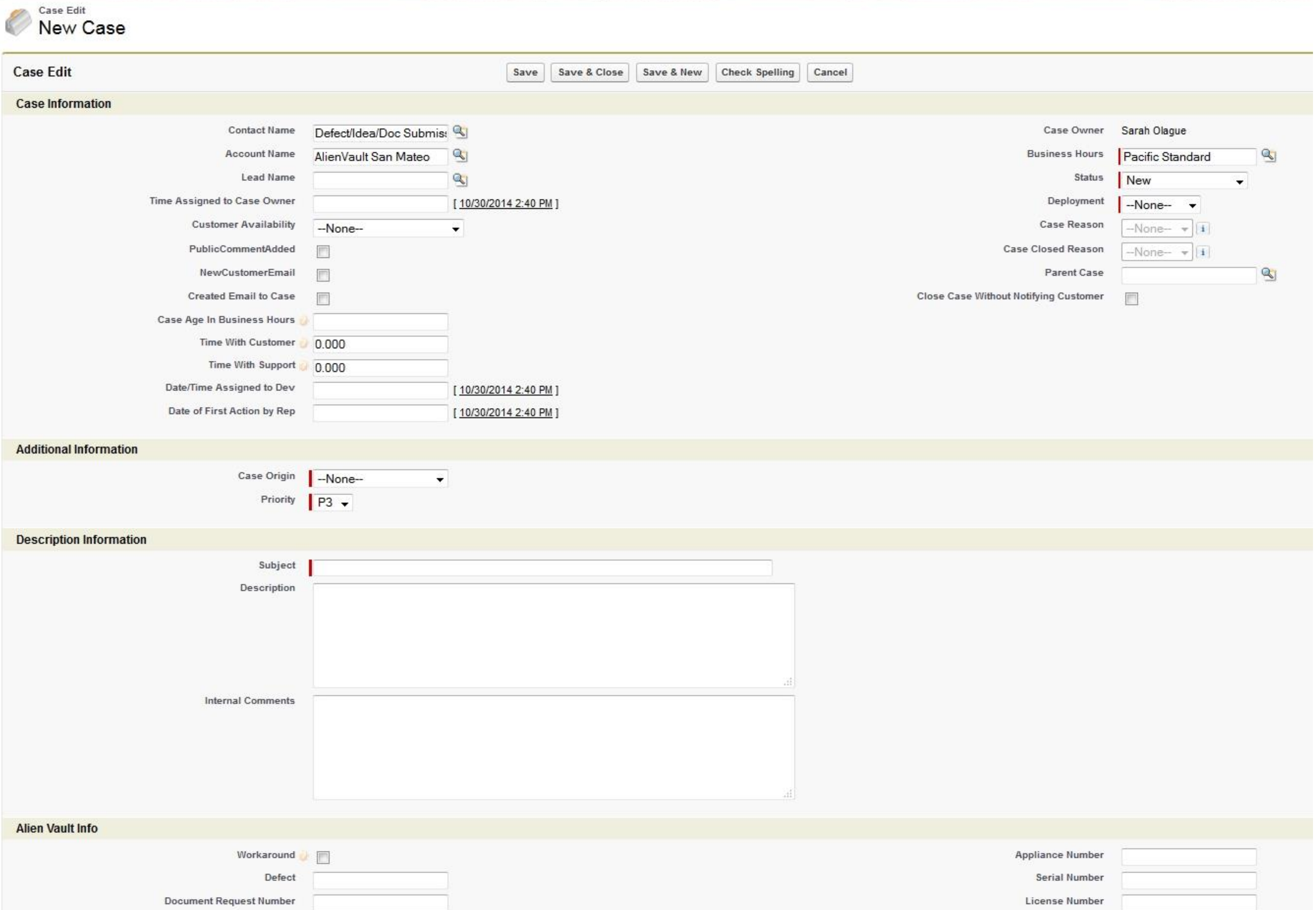
Modifying Contacts
Be careful when modifying the email address for a contact linked to a reseller account in SalesForce as it is tied to the contact's login for the Portal.

Case Creation

Standard
Once the account and the contact have been created, and the contact has been verified, you should create a Case for the customer.

Before creating a Case, you must verify all of the contact's information, including their name, contact phone number, and email address. Make sure they have all been entered correctly before creating a new case! In addition, you must verify that you are speaking with the AlienVault administrator for that company.

To create a case, go to the account, click on the contact (to go to that contact's individual page), scroll down to the Cases section and click the New button. This will take you to the case creation page:


Case Edit
New Case

Case Edit | Save | Save & Close | Save & New | Check Spelling | Cancel

Case Information

Contact Name: Defect/Idea/Doc Submis
Account Name: AlienVault San Mateo
Lead Name:
Time Assigned to Case Owner: [10/30/2014 2:40 PM]
Customer Availability: --None--
PublicCommentAdded
NewCustomerEmail
Created Email to Case
Case Age In Business Hours
Time With Customer: 0.000
Time With Support: 0.000
Date/Time Assigned to Dev: [10/30/2014 2:40 PM]
Date of First Action by Rep: [10/30/2014 2:40 PM]
Case Owner: Sarah Olague
Business Hours: Pacific Standard
Status: New
Deployment: --None--
Case Reason: --None--
Case Closed Reason: --None--
Parent Case
Close Case Without Notifying Customer

Additional Information

Case Origin: --None--
Priority: P3

Description Information

Subject
Description
Internal Comments

Alien Vault Info

Workaround
Defect
Document Request Number
Appliance Number
Serial Number
License Number

You must enter all of the information detailed below for a new case.

- **Contact name.** This information is automatically populated if you crea
  ted the case from the contact page.
- **Lead name**. This information is automatically populated if you create the case from the lead page.
- **Account name**. This is automatically populated into the Account Name field when you create the case.
- **Parent (previous) case number**. If the customer is calling about a recurring or ongoing issue, enter their previous case number into the Parent Case field. Otherwise, leave it blank.
- **Status**. The status field should always be set to **New** to ensure others can see the case in the queue.
- **Priority**. You must accurately assess the urgency of each case and classify it according to our priority system. Never mention the priority of a case to any customer. To determine the priority of an issue, see the Case Priority Guidelines. Each case must be classified as a P1 (most urgent), P2, P3, or P4 (least urgent). Once you have determined an appropriate priority, select it from the Priority drop-down menu on the case creation page.
- **Case Origin**. Select the source used to report the case by the customer.
- **Deployment**. Select the type of deployment

- **Case Reason**. Based on the case description, select a case reason from the drop-down menu. The Case Reason list is dependent on the Deployment. If you are ever unsure of which case reason to use to classify a specific case, ask a supervisor for help.
- **Description of the issue**. Enter a one-sentence description into the Subject field, and then add as much additional information as possible into the Description field. The more notes you enter, the easier it will be for a Technical Support Engineer to diagnose and resolve the issue quickly. Once you enter the customer's issue, repeat it back to the customer to verify that you have understood their problem correctly.

Leave the **Assign using active assignment rules** box checked – this will automatically place the case in the Support, Unassigned or Unsupported queue. Finally, click the Save button to create the case.

Give the customer their case number.

Web / Portal Cases

Customers have the ability to create Cases for themselves via the customer portal or through a web interface. When a portal or web case is submitted, a case is created in SalesForce and is automatically placed in the Support queue. Note that customers can select the Customer Availability and select which office they would like to be supported by.

When you attempt to contact a customer and you receive their voicemail, leave a message and follow up with an email to let them know that you attempted to call. Make a note in the case that you attempted to contact the customer via voicemail and email.

Sometimes when a Case is created the contact detail is put into the Web Information in the Legacy section of the Salesforce case, rather than the Case Detail section. To correct this, a Contact Center agent or supervisor must keep track of these web cases and correct the Case Information before assigning a case to a Technical Support engineer.

Customer Callbacks

If a customer calls back regarding an existing issue, you must first determine whether they have an existing case. If they do not have an open case, or if their case has been closed, you must create a new case for that customer. We cannot reopen cases per the customer's request.

1. If it is a new issue that sounds unrelated to the customer's previous case, create a new case and do not reference their previous case; treat this callback as a new call.
2. If the customer is having the same issue and their case has been closed for over a month, create a new case and reference the previous case number in the Subject field of the case description. Then, treat this new open case as if it were the same case as their previous case (see below).
3. If the customer's case is open, you must see if the case owner is available to take the call. If so, transfer the call to that support engineer or offer a call back.

Reopening Cases

When a customer calls with a recurring issue related to a case that has been closed, you can re-open the referenced case, only if the original case was closed within the same month. If the original case is older than 1 month, or has no relevance to the previous case, you should open a new case, reference the parent case if it is a continuation of an older case.

If the customer asks about reopening their original case, explain that their old case information will be linked to their new case, but per proper procedure, you must create a new case. Note that you should never clone a case and you should always add notes into the case to make it clear as to what was done. If the technician who worked on the original case is not available, and the customer wants to wait, you should notify the technician via IM that the customer is waiting and ask them to read the case notes.

You can use this script to communicate this to the customer:

> *"I am creating a new case for you now. All of your previous information will be attached to this case. Your new case number is 00123456"*

If they protest, you should say:

> *"I am sorry, but I must create a new case for you. I can assure you that all of your case information will be preserved and directly referenced in this new case."*

Case Escalations

There is an expected amount of time and work that should be involved in working through a customer issue. However, there are scenarios where an issue can simply be beyond the technical ability of the technician who is handling the case. Once the following criteria has been met, an escalation should be sought:

- Exhausted the solutions database and all other available documentation, including your personal notes
- Checked SalesForce case history to see if the same issue has been solved by another technician
- Checked JIRA (Defect and Idea tracking system) to see whether this issue is a known issue
- Clearly documented everything you've learned about the issue in the case notes, complete with test examples and error messages (if applicable)
- The issue has been actively worked for over an hour and half (note that research time does not count here, only time spent actively investigating with a customer)

The first point of escalation for all technicians is the Tier 2 lead they have been assigned to work with during the course of their work day. The Tier 2 lead is responsible for ensuring the case is properly reviewed and handled by the correct elements to expedite a resolution for the customer.

In many cases the Tier 2 lead will have time to troubleshoot the issue alongside the technician. If possible it is expected that the Tier 2 Lead will work with the TSE, to ensure that the issue can be resolved in a timely fashion. The Tier 2 may also have to take ownership of the case and work on it as their own case, depending on the complexity and availability of the Tier 2. In the event there is no Tier 2 immediately available to assist, the technician will transfer ownership of the case to the Support Escalation queue, in order to be handled by the next available Tier 2 technician.

In the event a case has been reviewed by a Tier 2 and no progress has been made in over six hours of working the case, the issue must be escalated to **Tier 3**/Engineering. To facilitate this process, a Tier 3 lead must take ownership of the case and will contact the Escalation Manager as needed. The Escalation Manager is responsible for getting the assistance of the correct engineering elements to aide in resolution of the issue.

The senior technician owning the ticket will then follow the outlined procedure:

1. Provide a summary of the issue in the Case Comments and start with : **Escalation Reason**
2. Enter a detailed description of the issue that is occurring, including the steps you have taken to attempt to resolve the issue. Provide copies of logs or screenshots that may be of assistance to the engineering team.
3. Update the subject of the case to reflect the case issue.
4. Contact the Escalation Manager and provide the case number and a brief summary of the assistance required.

The Escalation Manager will then seek the required assistance from other elements of engineering as necessary. It will remain the responsibility of the support technician in charge of the case to manage all communications between engineering elements and the customer.

Lead Support Engineer(s)

Cork, IE – Maciej Podkomorzy

Madrid, ES – Roberto Miguel

San Mateo, US – William Fales

Austin, US – TBA

Escalation Manager(s)

Madrid, ES – Ana Acebal Spishock

Case Workflow

AlienVault has specific workflows to ensure efficiency in each case.

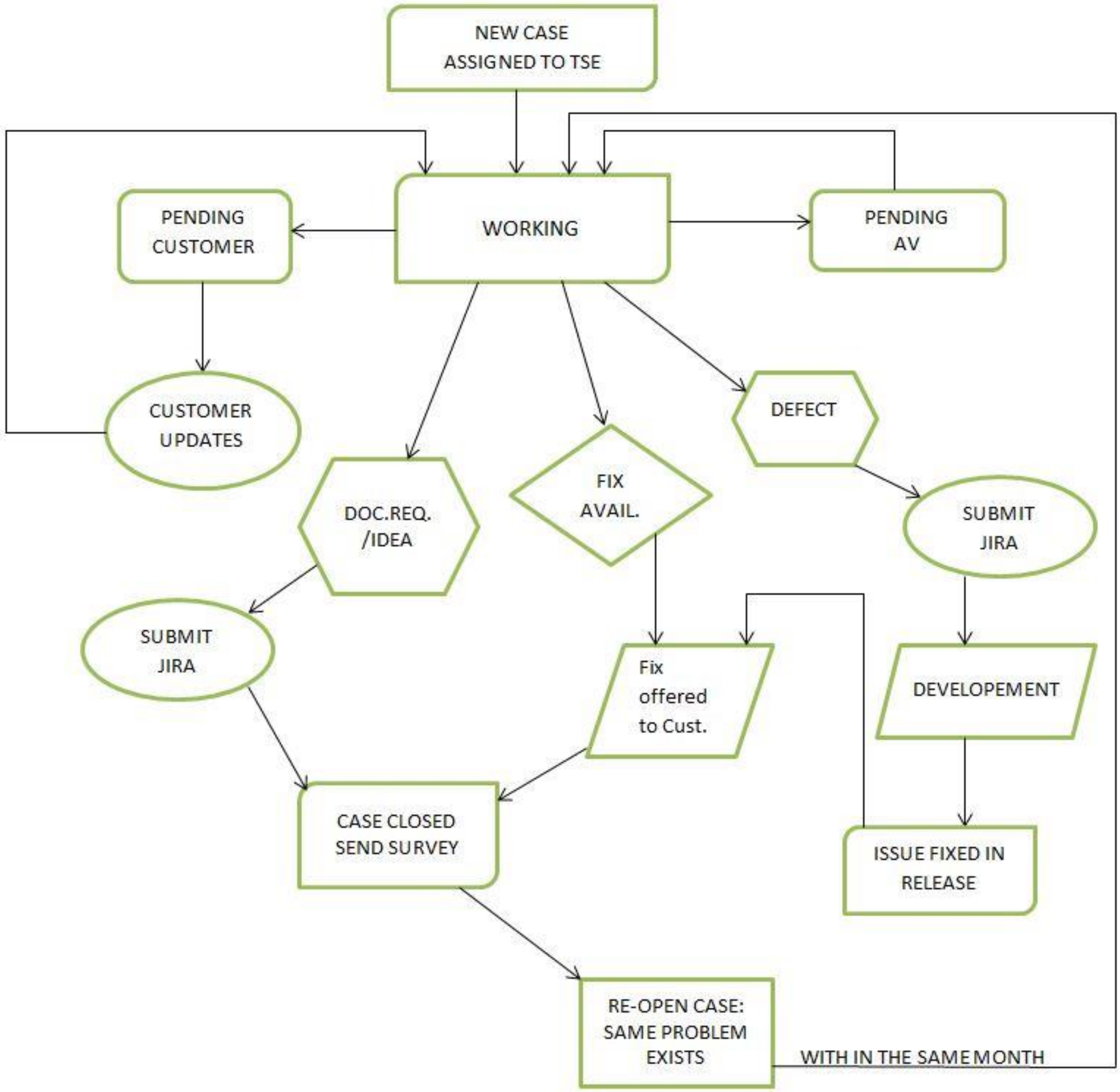
Summary of Status

Status	Description	Next Status
New	A case that has no AV action on it	Working
Working	A case that is assigned to a TSE and is a work in progress	Pending AV, Pending Customer, Closed
Pending AV	A case where a customer is awaiting an action from a member of AV staff	Working, Pending Customer, Closed
Pending Customer	A case that cannot be progressed without further information from the customer	Closed, Pending AV
Closed	A case where a solution has been provided to the customer	Working (if reopened)

Automated Status Changes

Old Status	Action/Condition	New Status
New	*Assigned to TSE*	*New*
New	Case closed (SPAM)	Closed
Working	*Customer updates cases*	*Manual Change - Pending AV*
Working	*TSE Emails customer for info*	*Manual Change - Pending Customer*
Working	TSE Updates customer	Working
Working	Fix provided (case closed)	Closed
Pending Customer	*Customer updates the case*	*Working*
Pending Customer	Reminder Email Sent to customer (4 days)	Pending Customer
Pending Customer	*No reply for 5 working days (7 days)*	*Closed*
Pending Customer	Fix provided (case closed)	Closed
Pending AV	*TSE Emails customer for info*	*Working*
Pending AV	*Update from customer acknowledge by TSE*	*Working*
Pending AV	Fix provided (case closed)	Closed
Closed	*Customer replies to case within 1 month*	*Pending AV*

Workflow Chart



How Often to Contact a Customer

As AlienVault aggressively works to resolve every support issue, it is important to make the most of each attempt to contact the customer. You should attempt to contact the customer three times in one week; after leaving a voicemail for a customer, the voicemail must be followed up with an email using the "Left a Message" email template.

Voicemail Script

The format of the voicemail message should be something like this:

"Sorry I missed you; I left you a voicemail and/or email regarding your case #XXXXXX. Please call me back at (650) XXX-XXXX so that I may help you with your issue. My hours are XX AM – XX PM PDT Monday - Friday."

Email Template

To send an email using the "Left a Message" template do the following:

1. Click "Send An Email" from the 'Emails' or 'Activity History' section of the case.
2. Click the "Select Template" button from the Send an Email page and then choose the "Left a Message" email template under the Customer Support Emails folder.

   The format of the email template is shown below:

   "I recently left a message with your voice mail. Please let me know of your availability to spend some time to work on your case: 00012345 in relation to: Case Subject."

3. Click Send.

If you receive the case early in your shift, it is standard procedure to call and email the customer when you first receive the case, again the next day, and a third time by the end of the week. Each contact attempt must be clearly noted in the associated case at the time of the attempt. The case must remain open until you make your third contact attempt.

If you are unable to contact a customer and do not hear back from the customer after three complete contact attempts, you should then close the case without sending a CSAT. If the customer leaves you a voicemail or email, you must reset the counter and try to contact them three times without hearing from them before you are able to close the case.

How to Format Your Email Signature

When sending an email to a customer, please use the signature created for you at: www.alienvault.com/signatures . Your title should state "Technical Support Engineer."

It is important to match this template exactly - every AlienVault employee should use an identical email signature.

Documenting Your Cases

Your case notes are a summary of the actions taken while working a case; all actions should be documented as precisely as possible in the Case Comments Section while you are working the case. The goal of these case notes is twofold. First, any technician should be able to pick up the case and know precisely where the case is at progressing to a resolution. Second, the case comments should also be made available in the event any technician uncovers a similar issue; explaining how an issue was resolved may aide in a technician in the future. A complete case history is invaluable in saving time and diagnosing further issues.

Due to a limitation in the size of the Case Comments field you may have to add multiple entries for one case to include all of the information. Be mindful that the oldest comment will be on the bottom; if you are imputing a large section of data, being inputting it from the bottom..

You are expected to document each of the following points in all of your case notes:

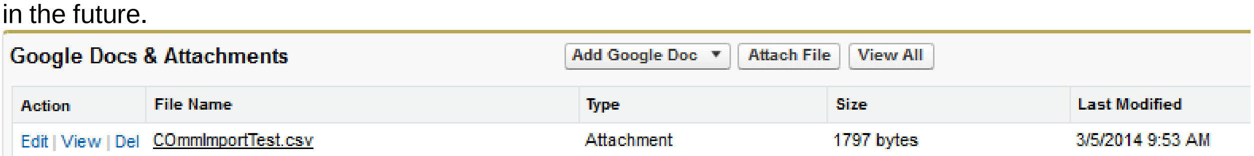
- **Any correspondence with the customer**
  - Approximate timestamp and length of any phone call
  - Body and timestamp from any email sent or received (even if already attached)
  - Every attempt to reach the customer over phone should be logged
  - Any voicemail messages left must also be summarized and noted
- **Any topics covered over the phone**
  - Questions asked by the customer and summarized answers
  - Comments on the product or functionality
  - Any potential sales leads that were discussing during the call
- **Technical information gathered while working the case**
  - Complete description of the problem
  - Any relevant command or log output
  - Proof or screenshots of any problem behavior
  - Vendor and model number(s) on any involved third-party products
- **Resolution**
  - Summarize the resolution and any key information to diagnose/resolve the issue
  - How any attached solutions were used to resolve the issue
  - Any assistance or recommendations' from co-workers that aided in the resolution
  - Whether the issue was resolved
  - Whether the customer is aware and in agreement it was resolved
  - Any customer plans to resolve the issue (if any)

Additionally, all relevant files should be attached to the case, an appropriate Case Reason must be selected upon closing the case, and any relevant solutions must be attached.

Note: Please be sure you do not check the "Make Public" link that appears next to each case note unless you intend the customer to read the note.

Attaching Case-Related Files

Relevant documents such as screen shots can be attached to cases for reference. To attach a file, scroll to the Attachments section of the case, click Attach File (note that the limit size is 10MB), browse to the location of the file and then click **Done**. A link to the file is displayed and available for download by anyone accessing the case in the future.



Referencing Knowledgebase Solutions

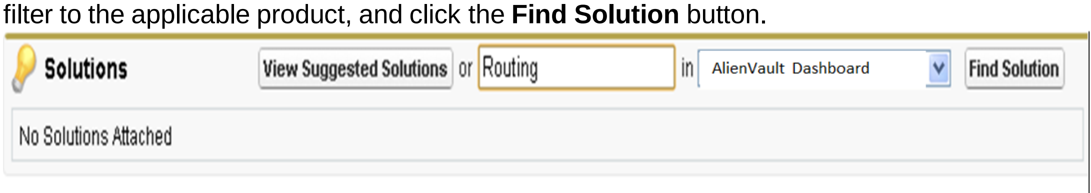
When encountering a problem you are unfamiliar with, your first step should be to search for the answer within the Salesforce solutions database. The solutions database, managed by Technical Support, is populated with solutions written by support technicians, and the technical writer. The Solutions database is a great source of information for tech support; you should become familiar with the solutions.

Attaching Solutions To Cases

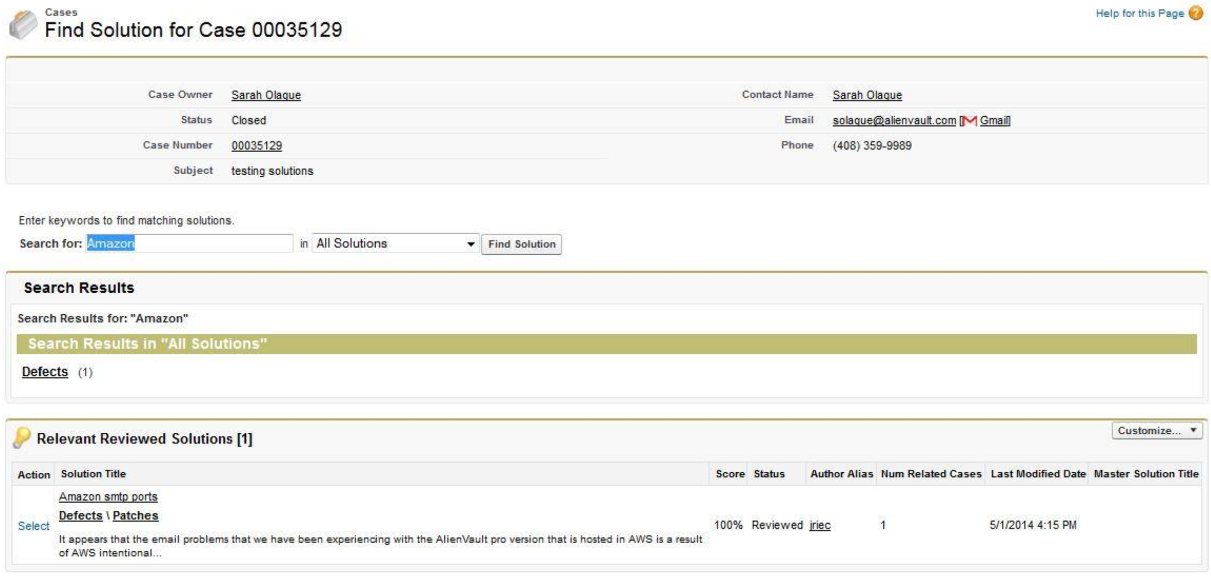
If a solution is used to resolve an issue, it should be attached to your case for reference. If you feel a public solution will provide a better understanding of the issue, or if a specific solution is requested by a customer, it should be attached to the case and sent to the customer. Solutions that did not specifically assist with the resolution of your case should not be attached to the case. In general, only one solution should be attached to each case – the solution that most directly resolves the specific issue. If a case has multiple issues, or is simply an initial setup case with many customer questions, it may then be appropriate to attach more than one solution.

Follow the steps outlined below to attach a solution to a case.

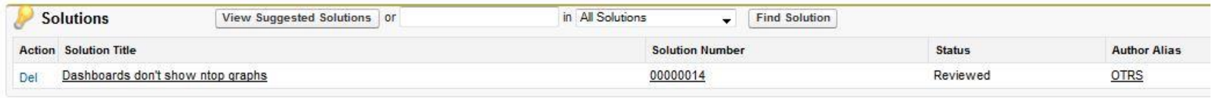
1. From the Solutions section of the SalesForce case, type the solution search term into the dialog box, filter to the applicable product, and click the **Find Solution** button.



2. View the solutions returned for relevancy. Once the relevant solution has been identified, click the **Select** hyperlink associated with the solution to attach it to the case



3. Verify the solution has been attached to the case by viewing the Solution Titles found within the Solutions section of the case notes.



Emailing Solutions to Customers

If you find relevant public solutions while working on a case, you should send them to the customer in addition to attaching them to your case. You can send them while you are on the phone with a customer, or afterward as a follow-up. Solution emails are never substitutes for a callback – they are intended to help the customer understand the solution to their issue, and possibly reduce the length of the support call.

1. Click the **Send An Email** button found in the Email or Activity History section of the case.

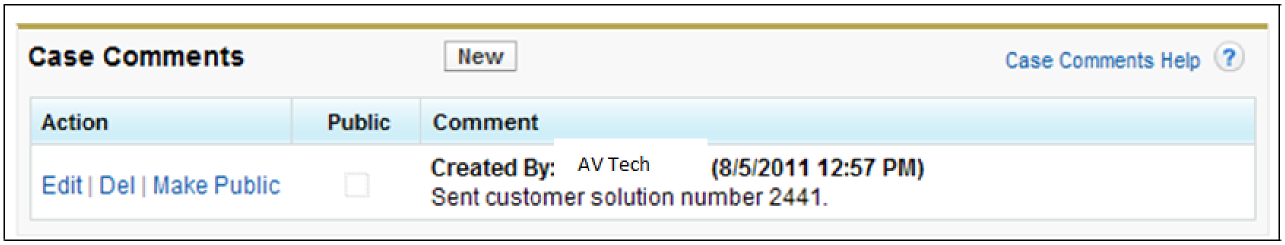
2. Click the **Select Template** button and then select the Solution email template from the Customer Support email folder.

3. Review the email to ensure it has been formatted correctly and has the correct solution attached.

4. This email template will insert **all solutions** that have been attached to the case into the body of the email. If more than one solution has been attached to the case, delete the non-relevant solutions from the email before sending the email.

5. Click the **Send** button to send the email to the customer. Do not change the subject of the message, as the subject is used by Salesforce to track the email. Using this email will exclude any internal notes of public solutions inadvertently sent to customers.

6. Enter a case note that the solution has been sent to the customer.



Closing Your Case

A case may be closed when one of the following conditions have been met:

1. The issue has been fully resolved and all questions have been answered. This means that the TSE has asked the customer "is there anything else that I can help you with?" If the customer has no further questions, ask the customer if you may close the case. If the customer agrees, it is then ok to close the case.

2. Defects & Enhancement Ideas have been submitted. We do not leave a case open for Enhancement Ideas that have been submitted to Engineering. If it is a Defect and have submitted to JIRA, place the case in the Development queue with the status of "Pending AV". If the issue persists a new case may be opened and linked to the "Parent Case" so that the history may be retained.

3. No Resolution Possible

   a. **Couldn't contact customer (after 7 days)**. The case will be closed after 7 days of the status being placed as "Pending Customer". This status should be placed anytime you, the technician, is waiting for the customer information or confirmation regarding an issue. After 4 days with no response (update) a reminder email will automatically go out asking if they still need assistance. If after 3 days, a total of 7 days, with no response from the customer the case will close. When the customer is ready we can re-open or create a new case. (Please see Re-opening cases guidelines)

   b. **Duplicate case**. There is another case for the same issue under this customer's account.

   c. **No Support Contract.** This is with a customer who did not renew their support contract or are not a customer yet. These customers/potential customers are pointed to the correct direction, forum or sales, and then the case is noted and closed.

   d. **Junk.** Spam that either goes to the Junk queue or is closed as Junk.

   Do not send a survey under any of the "No Resolution" scenarios.

SalesForce Scheduled Maintenance

When scheduled, SalesForce maintenance window notifications are sent to us via email and also displayed on a landing page after login to SalesForce. If a scheduled maintenance window coincides with your shift, immediately implement the following procedure:

1. Check http://trust.salesforce.com/ for the status of the SalesfForce scheduled maintenance
2. Add the scheduled maintenance window shortages into your Calendar as a reminder.
3. Print hardcopy of all cases prior to the scheduled down time.
4. Work on the hard copy cases until the SalesForce services are restored.
5. Once SalesForce services is restored, add all of the case notes and other relevant information into the SalesForce CRM-.

Support Performance Metrics

Customer Satisfaction Survey's (CSATs)

Among other metrics, AlienVault uses Customer Satisfaction Surveys (CSATs) to gauge the effectivenedd and efficiency of the Support Organization and the overall satisfaction of the Customer. The standard AlienVault CSAT rates on a scale from one to five, five being very satisfied and one being very dissatisfied, and asks the following questions:

How satisfied are you with the following:

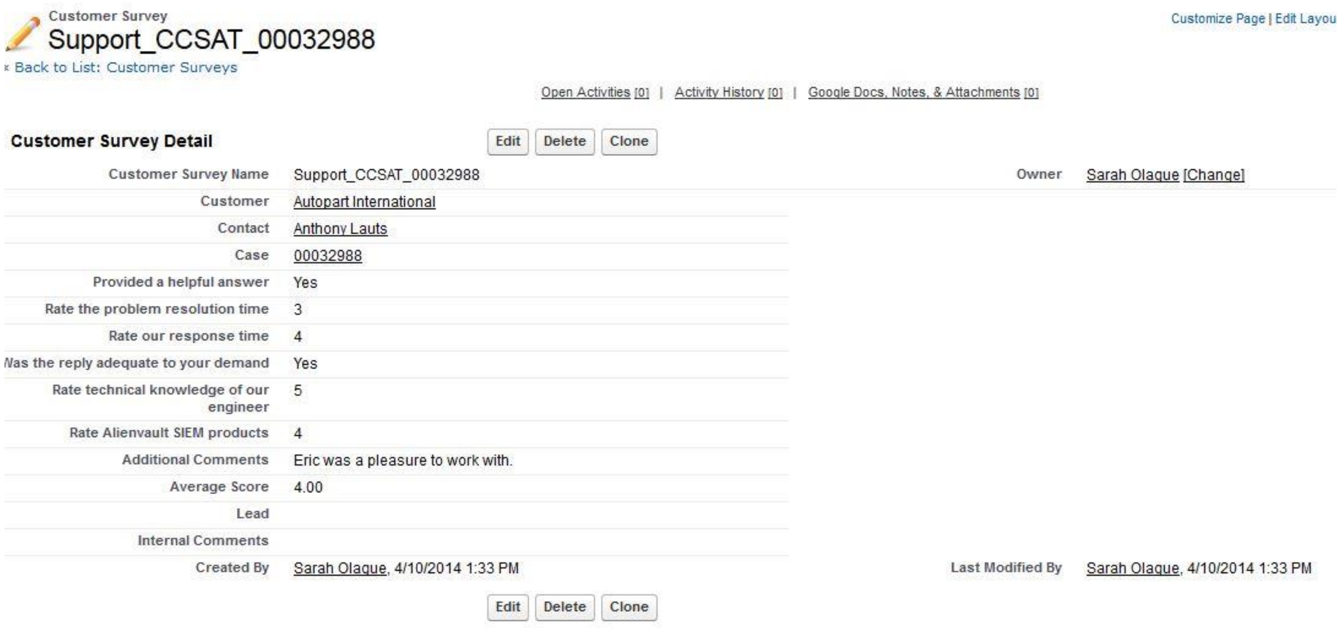
1. Has the issue been resolved?
2. How would you rate the time it took to resolve your issue?
3. How would you rate the process of case creation?
4. How would you rate the professional nature and courtesy of the technician?
5. How would you rate the technical knowledge of the technician?
6. How would you rate your satisfaction with our Alienvault product(s)?
7. Additional Comments (written comment section)

Every customer will receive a CSAT when their Support Case is Satisfactorily closed. The CSAT is automatically emailed from SalesForce when you close a case. It is possible to prevent transmitting the CSAT to the customer by unchecking the "Notify Contact on Case Close" checkbox on the Close Case page. You will only do this in the following scenarios:

- After three failed contact attempts, the customer was not successfully contacted
- When closing a duplicate case, to avoid sending the same customer multiple CSATs for the same issue.
- When directed to do so by your Supervisor or Manager

Viewing Your Survey Results

When the customer responds to a survey, the result is automatically linked to the case in SalesForce. To check Survey results, click on the Customer Surveys Tab in SalesForce to view the information returned.



Customer Survey
Support_CCSAT_00032988
« Back to List: Customer Surveys
Customize Page | Edit Layou
Open Activities [0] | Activity History [0] | Google Docs, Notes, & Attachments [0]

Customer Survey Detail Edit Delete Clone

Customer Survey Name	Support_CCSAT_00032988	Owner	Sarah Olague [Change]
Customer	Autopart International		
Contact	Anthony Lauts		
Case	00032988		
Provided a helpful answer	Yes		
Rate the problem resolution time	3		
Rate our response time	4		
Was the reply adequate to your demand	Yes		
Rate technical knowledge of our engineer	5		
Rate Alienvault SIEM products	4		
Additional Comments	Eric was a pleasure to work with.		
Average Score	4.00		
Lead			
Internal Comments			
Created By	Sarah Olague, 4/10/2014 1:33 PM	Last Modified By	Sarah Olague, 4/10/2014 1:33 PM

Edit Delete Clone

Weekly Performance Report

A weekly report, based on Support activity from the previous week, is published to monitor and highlight Key Performance Indicators (KPI). The report measures Team and Individual metrics for Case Count, Close Rate, CSAT average as well as product specific metrics.

The following tables explain the report KPIs:

Team Stats Page	
SF Report	Close Time Avg by Agent – cases closed last week
Formula	Count of Individual and Team Opened & Closed Cases Count of Individual and Team Avg Hours & Max Hours Open

CSAT Summary Page	
SF Report	CSAT Summary Report – CSAT Cases opened last week
Formula	Normalized CSAT = CSAT Avg * Surveys vs. Cases Closed Cases Totals = Does not include Case Reason 0000

Team Close Rate	
SF Report	Close Time Avg by Agent – cases closed last week
Formula	Count of (cases) total hours opened / Count of Case

Solution Summary	
SF Report	Cases Using Solutions by Agent – cases closed last week
Formula	Cases = Cases closed last week with solutions and without Case Reason 0000 % Sent = Number of solutions sent / case count without Case Reason 0000

Hardware Issues and Replacement

LightSpeed Replacement Service (LSR)

AlienVault Hardware Products

For all purchased AV hardware appliances, AlienVault offers a warranty service branded LightSpeed Replacement which ensures our Customers the swift exchange of defective hardware. AV provides LSR service free of charge for the first year and for an additional cost, LSR can be extended after year one. AV Hardware covered by LSR, determined faulty by Technical Support and confirmed by our hardware vendor, will be replaced with new or refurbished equipment.

Power Supplies and HardDrives are the only components authorized for replacement. If another component needs to be replaced an entire unit will be shipped. The customer is not allowed to open the hardware appliance as this will void the LSR.

Replaced appliances or components will not be returned to the Customer and become the property of AlienVault. The LSR period is not extended when components or appliances are replaced.

Legacy Hardware Products

All legacy hardware is not under any type of replacement or warranty program. If there is an uncorrectable defect in the hardware, notify the Customer Success/Renewals team so they can discuss upgrade options with the Customer. Typically, Customers will have the option of migrating to AlienVault supported Hardware or Virtual Machine.

Out of Spec Units

If you come across an AlienVault that appears to be out of spec, please create a case and transfer to the Hardware Procurement agent by placing it in the Customer Service queue.

3rd Party Hardware

We do not provide the option to upgrade an existing OSSIM installation into a professional USM instance. As a consequence we no longer support utilizing the OSSIM ISO to deploy a USM system to a non-standard hardware platform. While this will not be allowed in the future, we continue to have customers who have deployed in this fashion prior to this change in policy. We will continue to provide "Best Effort" support for these customers, but we must firmly inform them that their operating platform is no longer supported and they should adhere to our deployment guidelines. In the event the issue(s) the customer reported are traced back to either the hardware platform or deployment methods, support efforts will cease and the customer informed to deploy in a supported method before troubleshooting will continue.

Note: Any Defects discovered on these platforms must be reproduced in a properly deployed lab environment before filing a JIRA issue.

Customer Access

Support Customers with No Internet Access

In certain cases, Customers on a highly secure network may not allow access to their AlienVault to troubleshoot their issue. This is prevalent with Financial Institutions, Government Organizations, and some Healthcare Providers. Should you encounter this situation, you should provide all assistance possible to the best of your ability and access. Assistance will be provided within the scope of support with consideration of liability. Under no circumstances will you provide confidential company information, or provide troubleshooting steps for a third party product outside of officially approved documentation.

Hardware Troubleshooting

Troubleshooting Hardware

Solutions for troubleshooting a hardware appliance can be found in Salesforce under the below titles:
Solution #00000491 – How should support troubleshoot power supply issues with the 1U chassis?
Solution #00000493 – How should support troubleshoot memory issues with the 1U chassis?
Solution #00000494 – How should support troubleshoot hard drive issues with the 1U chassis?
Solution #00000495 – How should support troubleshoot overheating/fan failure issues with the 1U chassis?
Solution #00000496 – How should support troubleshoot power supply issues with a Remote Sensor?
Solution #00000497 – How should support troubleshoot memory issues with a Remote Sensor?
Solution #00000498 – How should support troubleshoot hard drive issues with a Remote Sensor?
Solution #00000499 – How should support troubleshoot overheating/fan failures with a Remote Sensor?

Processing an RMA

Solution #0000492 – How should support process an RMA?

1. **RMA Approval**

   All RMA approvals will come from the MBX technician.

   If the problem persists after following the troubleshooting solutions and a hardware issue is determined, approval from an MBX technician is the required to process the RMA. You can contact MBX at support@mbx.com or 888.440.1617. Once approval is received, attach the approval to the case.

2. Add ******RMA Approved******, or ******EMEA RMA Approved****,** to the beginning of the case's subject, so the next team will know exactly what to do with it.
3. Ensure only the serial number of the LSR box is listed in the case. If multiple serial numbers are listed, remove all but the serial number of the box to be replaced.
4. Leave the case open.
5. Once the case has been fully prepared and approved, change the case owner to Customer Service queue.

Solutions

When assisting a Customer and in need of information, Solutions should be one of the first areas you search for answers on how to solve the issue. The solution base we use through Salesforce.com is mostly generated by the Support Staff and other internal elements. It is expected that each member of the Support Team provide content for this database and update or contribute new information.

Searching the Solution Base

To search the solution base, select the "Solutions" tab in Salesforce.com and input the keywords desired in the "Search for" field at the top of the page. Also make certain to set in the "in" pull down to the relevant Category group if you know it; leave it set to "All Solutions" if not.

You can use basic Boolean operators when performing such tasks:

- **OR:** This can be used to pair two terms and display any document containing either term (e.g., "network latency OR latency").
- **AND:** This can be used to pair two terms and display any document containing both terms (e.g., updating AND openvas).

You should use double quotes to keep terms with multiple words identified as single terms. This will allow accuracy of your searches to be consistent. A search for "Network Latency" will only retrieve solutions that contain the string "Network Latency".

Formatting New Solutions

Specific guidelines should be followed when writing solutions in SalesForce.com. Refer to Solution #0000358 for guidelines on how to format the solution and also what content should be included to provide an effective solution.

- **Solution Title:** This should be phrased in the form of a question, for both internal and public facing solutions. Public facing solutions should be a question related to a task or information question, "How can I update my AlienVault USM?" Internal facing solutions should be directed to Support in the title and phrased similar to an external solution, "How can Support troubleshoot high Ram utilization?"
- **Solution Number:** This will be automatically assigned by creating a new solution and cannot be modified as part of the creation process. The number should not be changed when updating or modifying existing solutions. Do take note of this number once you create a solution, as this will be used to reference the new document.
- **Platform:** The first field required when writing a solution is the "Platform" field. The Platform will specify what deployment type(s) the solution will be applicable towards. "All Platforms" will apply to any deployment, hardware or firmware revision. This field will define the target audience for this solution. For example, the USB ISO Restore solution would have a Platform field containing "All hardware deployments", while the solution to configure promiscuous mode on a VMWare host's NIC will be "All virtual deployments operating on VMWare."
- **Answer:** The answer section of the solution provides the information required to address the solution topic. These should be in clear, concise language and formed in a structured instructional format. The solution must contain the following data points in the answer:

- How you verify this solution is relevant to the issue that is being experienced, or contains the proper answer to the question being asked
- Numbered instructions that can be followed to solve the problem, or detailed technical information regarding the question being addressed.
- Any information needed to avoid misdiagnosing the issue and any relevant links, to closely relate solutions.

- **Additional Information:** Occasionally we need to reference other documents, or third party sites/links in order to properly assist the customer. Any information required that does not neatly fit into the structure of the answer can be added to this field. Each subject should be contained on a single line, a keyword followed by a colon preceding the information.
- **Solution Categories:** The solution categories must be set once the draft of the solution is created. Once the solution has been created and you are present on the page of the newly created solution, press the “Select Categories” button beneath the body of the solution. Select all categories that you feel are relevant for the newly drafted solutions.

Modifying Existing Solutions

The formatting outlined for new solutions must be followed consistently with any modification made to a solution. When modifying an existing solution, the proposed modification should be vetted initially with at least one other person before modifying working solution. The solution will otherwise follow the same process and procedure for approval as a new solution.

Approval Process

In the interest of maintaining the quality and relevance of our solutions, there is a series of steps that will be taken before a new solution is approved for either internal or external consumption. The workflows outlined below are to be followed in any and all cases of new or modified solutions.

New Internal Solution

- The solution must be written to follow the format guide. It should be proofread for any grammar errors and verified to the best of the ability of the author for technical accuracy. The new solution will be created in a “Daft” state.
- The solution will then be sent to an approver to verify that the structure, writing and technician accuracy of the solution is sufficient to be used as a solution.
- The reviewing Tier 2 will change the status yo “Approved” and an email will then be sent out to supportteam@alienvault.com and av-se-team@alienvault.com to alert the technical elements about the new solution.

Modify Internal Solution

- The proposed change to the solution should be checked by one other technician before modifying the solution. When the solution has been changed, the solution will then enter the “Modified” state.
- The proposed change will then be sent to an approver to verify that the structure, writing and technical accuracy of the solution remains sufficient for consumption.
- The reviewing Tier 2 will change the status of the solution to “Approved” and an email will then be sent out to supportteam@alienvault.com and av-se-team@alienvault.com to alert the technical elements about the new solution.

New External Solution

- The solution must be written to follow the format guide. It should be proofread for any grammatical errors and verified to the best of the ability of the author for technical accuracy. The new solution will be created in a “Draft” state.
- The solution will then be sent to an approver to verify that the structure, writing and technical accuracy of the solution is sufficient for consumption.
- The solution will then be sent to members of Product Management to ensure the document is fit for public consumption and methods of interfacing with the product are properly communicated to the Customer.

Currently, the approving members are: Jim Hansen (jhansen@alienvault.com), Lauren Barraco (lbarraco@alienvault.com).

- The reviewing Tier 2 will change the status of the solution to "Approved" and an email will then be sent out to supportteam@alienvault.com and av-se-team@alienvault.com to alert the technical elements about the new solution.

Modify External Solution

- The proposed change to the solution should be checked by one other technician before modifying the solution. Once the solution has been changed, the solution will then enter the "Modified" state.
- The proposed change will then be sent to an approver to verify that the structure, writing and technical accuracy of the solution remains sufficient for consuption
- The solution will then be sent to members of Product Management to ensure that the document is fit for public consumption and methods of interfacing with the product are properly communicated to the Customer. Currently, the approving members are: (jhansen@alienvault.com), Lauren Barraco (lbarraco@alienvault.com).
- The reviewing Tier 2 will change the status of the solution to "Approved" and an email will then be sent out to supportteam@alienvault.com and av-se-team@alienvault.com to alert the technical elements about the new solution.

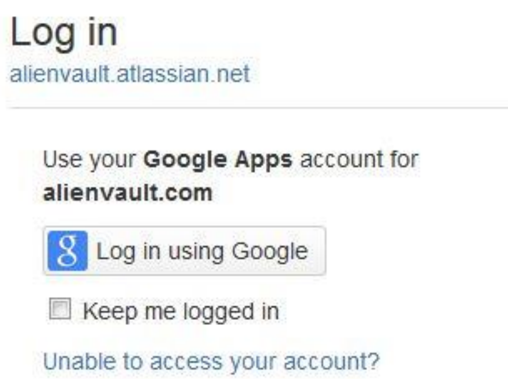
Reporting Defects and Ideas (JIRA)

It is the responsibility of Support to report any issues or deficiencies that have been identified in the product. Anything which negatively impacts existing functionality within the product is considered a Defect. Anything which details functionality the product either does not have or outside the scope of existing functionality is considered an Idea. Support must document for both Defects and Ideas and provide information required by the elements responsible for categorizing and prioritizing these for resolution or incorporation.

Searching for Defects in JIRA

When a potential Defect is identified, it may already be filed in JIRA, the Defect tracking system in use by AlienVault and in order to confirm this you will need to search through reported issues using keywords related to the suspected Defect.

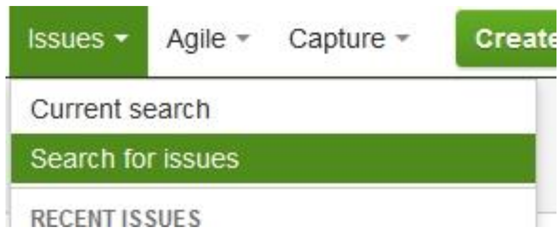
1. Connect to JIRA at https://alienvault.atlassian.net
2. Log in using your AlienVault credentials, which also work as Google credentials:



3. Once logged in, confirm that you are using the JIRA aspect of Atlassian. Make certain the bullet is next to "JIRA" when you click the three (3) bars in the upper left hand side of the web page. In the event you have defaulted to another area, select "JIRA" from the list.

4. Within JIRA, under Projects, select USM Engineering. Select "View All Projects" if you do not see USM Engineering and select it from the larger pull down.

5. Once you are within the correct project, select "Issues" then "Search for Issues".



6. In the page that loads, next to "Assignee: All" input keywords about the issue in the box labeled "Contains Text". This will then search the existing Issues for matches to your search criteria.

7. If you locate a Defect that matches your symptoms and you can reproduce the issue with the outlined steps, if any, you will need to associate the case with the Defect.
    a. Click "Edit" button in the upper left
    b. Enter the Case number in the "CRM Reference Field".
    c. Delimit this field with a comma if there is already information located here
    d. Select the "Comment" button located at the bottom of the page. Enter the Customer Name, case number and any comments. Make sure to attach any relevant log files and to read previous comments to provide any additional information requested by engineering.
    e. Click Create Issue to Submit.

Creating a New Defect in JIRA

If you were unable to find a Defect that matches your issue within JIRA, follow the steps below to create a new one. Please note that it is the responsibility of Tier 2/3 to enter Defects into JIRA. Please do not file defects as a Tier 1 and refer these tasks to your assigned Tier 2/3.

1. Connect to JIRA (https://alienvault.atlassian.net) and login with your credentials.
2. Once logged in, confirm that you are using the JIRA aspect of Atlassian. Make certain the bullet is net to "JIRA" when you click the three (3) bars in the upper left hand side of the web page. In the event you have defaulted to another area, select "JIRA" from the list.
3. Click on the "Create" button along the top of the page. This will then open a new window where the details about the new Defect should be input.
    - **Project**
        - USM Engineering
    - **Issue Type**
        - Set to "Defect". Be aware other issue type follow different triage procedures, so this <u>must</u> be set to Defect

- **Summary**
  - The summary should include a clear and complete picture of what component is impacted and in what way behavior is either expected or unexpected. This must be a complete thought.
- **Description**
  - This should be the rest of the story that we summarized above. Include as much detail as possible that appears relevant to the reported issue. Any specific or unusual elements of the customer environment should be included here as well. You should make note of the organization who reported the issue. Mention by file name and information contained all files attached to this issue.
- **Impact**
  - This should be a clear description of what the felt change is to the customer or in the customer's environment; business impact is a plus. We should at a minimum include the impact that is felt while performing tasks on a system.
- **Priority**
  - This should be left to the default of "Major".
- **CRM Reference**
  - The customer case number which led to this issue creation should be listed here. In the event you are creating a Defect with multiple impacted customers, input all cases in a comma delimited format.
- **Steps to Reproduce**
  - Can be reproduced
    - In order to assist QA in properly reproducing the issue, these steps must be as granular and specific as possible. Begin with the login to either the web interface or the console interface. Include what specific type and version of browser used when reproducing a web based Defect. Include each step of navigation required and provide the exact input data used when describing the events. Do not take any step for granted when describing this process.
  - Cannot be reproduced
    - The first piece of information included should be why we were unable to reproduce this, along with any information required for QA to attempt to reproduce or identify the issue. Include as much detail as possible to help identify and correct the unreproducible issue. Make sure to present a step by step sequence, as above, of how the issue was observed if at all possible.
- **Actual Behavior**
  - The information included here is critical as this is the part that defines the perceived defective behavior. This should be as specific as possible and if it has a web component a screenshot should be included to illustrate the defect.
- **Expected Behavior**
  - This should be a clear outline of what the results of the action should have been, or a reasonable individual would have expected. As much information as possible about what led to an expectation should be included.
- **Affects Version(s)**
  - Select all versions that are confirmed to display the behavior outlined in the JIRA

ticket being created. You may need to select “Show All” in the pull down in order to display the desired version.

- **Attachment**
  - Any relevant log output which is too large to include in the Overview Description or Actual Results will be added as a discrete file. Screenshots that describe or capture issues should also be added, along with any other relevant information such as packet captures, network diagrams and other unusual or critical information to the circumstances that led to the discovery of the issue. Make absolutely sure to mention these files and the contents in the Overview Description.
- **Linked Issues**
  - In the event the issue is linked to another known issue, you will want to select the correct relationship from the pull down on the top. The bottom one will offer suggestions based on the Summary. You can also manually input the full JIRA id of the related issue.

4. Click Create to submit the defect.
5. Note the Defect Number.

Referencing Defects in SalesForce Cases

It is important to reference the Defect in the Salesforce.com case in addition to referencing the Case in JIRA. Open the applicable case in Salesforce.com and enter the Defect number into the “Defect Number” field. Alternatively, edit the case’s attributes and add the Defect number there.

Documenting Workarounds

In the course of troubleshooting a customer issue, we will frequently come up with solutions to the problem that requires back end configuration changes to resolve evident symptoms or causes. It is our responsibility in Support to document this information in two places; the Salesforce.com Case and the associated, JIRA Ticket.

To properly document Workarounds, do the following:

In Saleforce.com:

1. Document the steps taken to workaround the issue in the Salesforce.com case. Use a case comment and put ****WORKAROUND STEPS**** in the first line of the comment.
2. Check the box in the case fields next to “Workaround Implemented”.
3. Make certain to associate the JIRA ticket with the case (for assistance in creating a new issue, see **Creating a New Defect in JIRA**)

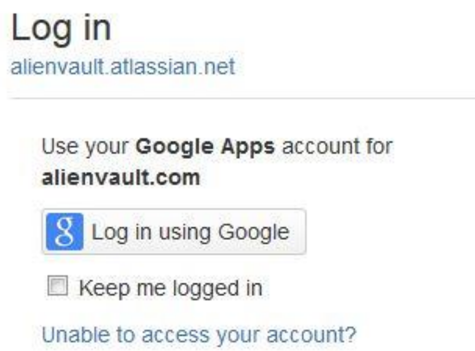
In JIRA:

1. Make certain that your case is reference in the CRM Reference Field (for assistance in doing this, see **Creating a New Defect in JIRA**)
2. Place the steps in the Workaround Field.
3. In a separate comment, state the account name and the case where the workaround has been implemented.

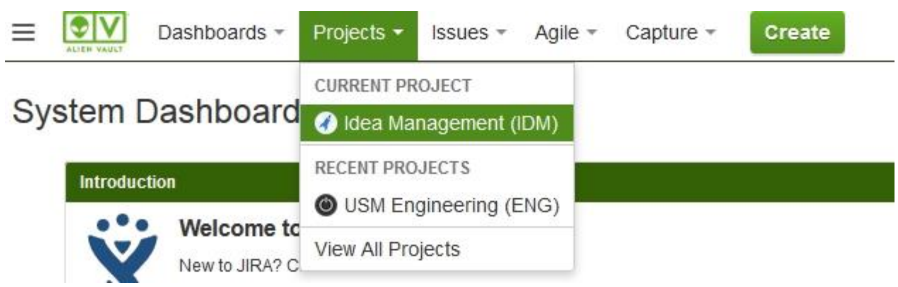
Searching for Ideas in JIRA

In the event Customers provide feedback on the product, it is Support’s responsibility to document this information. JIRA serves as AlienVaults’s Idea/feedback tracking system.

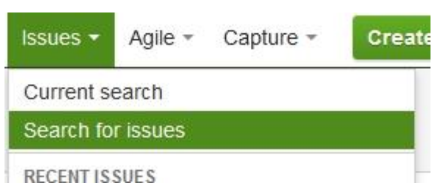
1. Connect to JIRA (https://alienvault.atlassian.net) and login with your credentials.



2. Once logged in, confirm that you are using the JIRA aspect of Atlassian. Make certain the bullet is next to "JIRA" when you click the three (3) bars in the upper left hand side of the web page. In the event you have defaulted to another area, select "JIRA" from the list.
3. Under "Projects", select "Idea Management". Select "View All Projects" if you do not see Idea Management selected from the larger pull down.



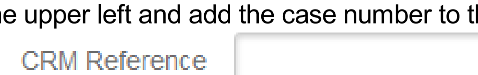
4. Select "Issues" at the top of the page and then "Search for Issues".



5. In the text box next to "Assignee: All", input some keywords about the issue in the box labeled "Contain Text". This will then search the existing Issues for any potential matches to your search criteria.

In the event you locate an Idea which matches or closely related to the customer's feedback, you will need to associate the case with the Idea.

6. Click the "Edit" button in the upper left and add the case number to the "CRM Reference Field".



Delimit this field with a comma if there is already information located here.

7. In the "Comment" section write a concise note providing the customer name and the case number that the customer provided feedback in. Add any further insight you may have from the customer on the value or use of the requested change/feature.

Creating a New Idea in JIRA

In the event you were unable to find an existing Idea that matches up with the customer feedback within JIRA, you will need to file a new Idea in JIRA to provide the feedback to the Product Advisory Team for consideration.

1. Connect to JIRA (https://alienvault.atlassian.net) and login with your credentials.
2. Once logged in, confirm that you are using the JIRA aspect of Atlassian. Make certain the bullet is next to "JIRA" when you click the three (3) bars in the upper left hand side of the web page. In the event you have defaulted to another area, select "JIRA" from the list.
3. Click on the "Create" button along the top of the page. This will then open a new window where the details about the new Defect should be input.

    - **Project**
        - Idea Management
    - **Issue Type**
        - Idea
    - **Summary**
        - The summary should include a clear and complete picture of what component is impacted and in what way behavior is either expected or unexpected. This must be a complete thought.
            - Good: "The ability to modify multiple assets at once should be implemented as simple tasks like enabling Network Monitoring require multiple clicks per asset."
            - Bad: "Customer wants to modify bulk assets."
    - **Description**
        - The problem description should include four critical pieces of information.
            - What the customer is attempting to do should be indicated. Be as general and specific as possible when filling out this area. State what the customer is attempting to do on a high level and then why he is running into difficulties on the lower level function of the appliance.
                - Example: The customer is attempting to deploy HIDS to a large number of hosts with different credentials for each host.
            - The customer's specific problem should be described, meaning what specific part of the process of performing this task they either want to improve, or cannot perform.
                - Example: The customer has to manually type each unique set of credentials into the system for every host they wish to deploy HIDS onto, which is taking an extremely long time.
            - Note the customer's firmware version. This is needed for tracking purposes and to remind technicians to double check if the presented Idea may have been implemented in a more recent release.
            - Note the customer's platform. Provide specifics if the system is deployed virtually or physically, and then what type of system is operating on the platform.
    - **CRM Reference**
        - The customer case number which led to this issue creation should be listed here. In the event you are creating a Idea with multiple known impacted customer, input all cases in a comma delimited format.
    - **Labels**
        - There are numerous labels within the system that can be used to further refine and tags issues to come up in specific patterns. Avoid creating new Labels, but if there

are any that are appropriate to the Idea, you should add them.

- **Attachment**
  - Any relevant files to help explain what the customer is requesting should be added. Screenshots showing current behavior, or details on competitors who do things a certain way the customer approves of would be excellent to help better understand the customer's feedback.
- **Linked Issues**
  - In the event the issue is linked to another idea. You will want to select the correct relationship from the pull down on the top. The bottom one will offer suggestions based on the Summary. You can also manually input the full JIRA id of the related issue.

4. Click Create to submit the Idea.

Telephone Quick Reference

A diagram of the phone and buttons and a list of common actions associated with the phone and its features is provided for reference.

Dialing Out

It is not necessary to lift the handset (or activate headset) prior to dialing however you may do so if you wish.

- Internal: Dial four-digit extension number
- Local: Dial 1 + area code + phone number
- Long Distance: Dial 1 + area code + phone number
- International: Dial 011 (or respective country code) + phone number

Answering Calls

To answer with the speakerphone, press  or tap **Answer**. To answer with the handset, pick up the handset.

To answer with a headset, press .

To answer a new call while on an active call, tap **Answer**. The current call will be held.

Placing Calls On Hold
Press **Hold** to place a call on hold (other party hears music) – line key turns from green to blinking red. Press “Resume” to return to the call.

Making a Secondary Call
To make a second call, press **Hold** then press an unused line key, then dial.

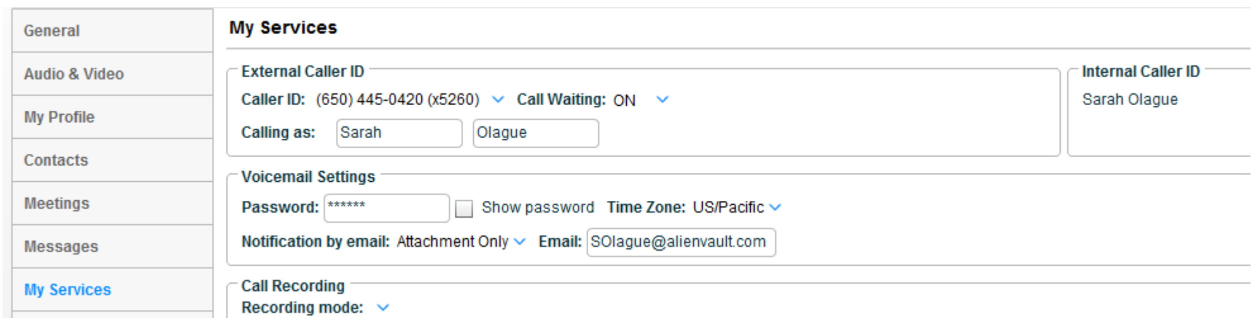
Transferring a Call
To transfer a call: Press **Transfer**, dial the destination number, announce the call and press Transfer again. To cancel a transfer, press the **Cancel** button at any time

Voicemail

Setup Voicemail Password

- Log into the “Virtual Office” (https://sso.8x8.com/login/uc)
- Go to “My Services”
- Select a password in the Voicemail Settings in the Password box
- Click 

    - You will now be using that password to access your voicemail



To access your Voicemail:

From your extension: 555
From another extension: 500
From an outside line: Dial your phone number and press # during greeting

Voicemail messages are delivered to your email in the form of a .wav file. You will need to log in to record your greeting and name prompts.

- To access ….
- To record your name and greeting: Press __ at the main menu

3-Way Call Conferencing
To add a third party to an existing call:

- Press **Conference** and dial another party (internal or external)
- Press **Conference** again to join all three parties or press **Cancel** to abort
- In an existing conference call:
- Press **Split** to end the conference call and put both parties on hold

From Lines or Calls View, you can:

- Tap **Hold** – to hold the conference
- Tap **End Call** – to end the conference
- Tap **Split** – to end the conference and hold all participants
- Tap **Join** – to join together 2 held calls

Corporate Directory
To search the Corporate Directory

- From the Home view, Tap **Directories**
- Tap **Corporate Directory**

Alternatively

- Tap **Applications** from the Home View
- Tap **Corporate Directory**

To dial a contact from the Directory

- From the **Corporate Directory**, tap the Contact
- From the contact's information screen, tap the contact's phone number

Customer Portal & Online Community

The AlienVault Customer portal is the front-end login to review case history, work on cases and submit new cases. Users can access the login from our main web site using the Customer Login button on the left side of the screen. When a user accesses the portal they can review past cases, current cases that are open and bring worked on and open new cases.

Support

This area allows the user to search knowledgebase solutions by product or through key word searches, view opened and closed support cases including case ID, description, and status.

Forum

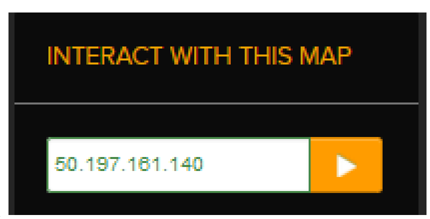
The online community is a forum for users to interact and exchange information on AlienVault, Inc. solutions. Community users can view forum topics, rate topics, create new posts, reply to existing posts, vote on product suggestions, modify their forum profile, and more.

Website Blacklist

The AlienVault Website Blacklist is an IP reputation database. Anyone being blocked by the AlienVault Blacklist we follow a standard procedure, explained below and described in solution 490.

A person (not necessarily a customer) may call in to report that their website is being blocked by AlienVault. The reason they are being blocked is that their website got flagged as being malicious. Submit a request to be removed from the AlienVault Blacklist.

If a customer or noncustomer calls in, you are to:

1. Apologize to the customer or noncustomer.
2. Direct them to : http://www.alienvault.com/open-threat-exchange/latest-threats
3. Have them place their IP address in the search box 

4. If it shows malicious , have them press the "Flag IP address for review" so the team can review and possibly re-classify