Welcome to Hitachi Vantara Customer Support for Pentaho

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Contents

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Getting Started with the Customer Portal

The Pentaho Customer Portal is the best place to start for finding everything you need to be successful with Pentaho. This document contains information about all aspects of our support organization, including the following:

- Getting Started with Customer Portal
- Hitachi Vantara Technical Support Organization
- Technical Support Process
- Issue Reporting
- Downloading and Installing Pentaho Software
- Pentaho Service Packs
- Hitachi Vantara Virtualization Support Statement

You will receive a verification email with your Customer Portal login information within 24 hours of receiving this welcome letter. Be sure to validate your email address using the link provided in the verification email.
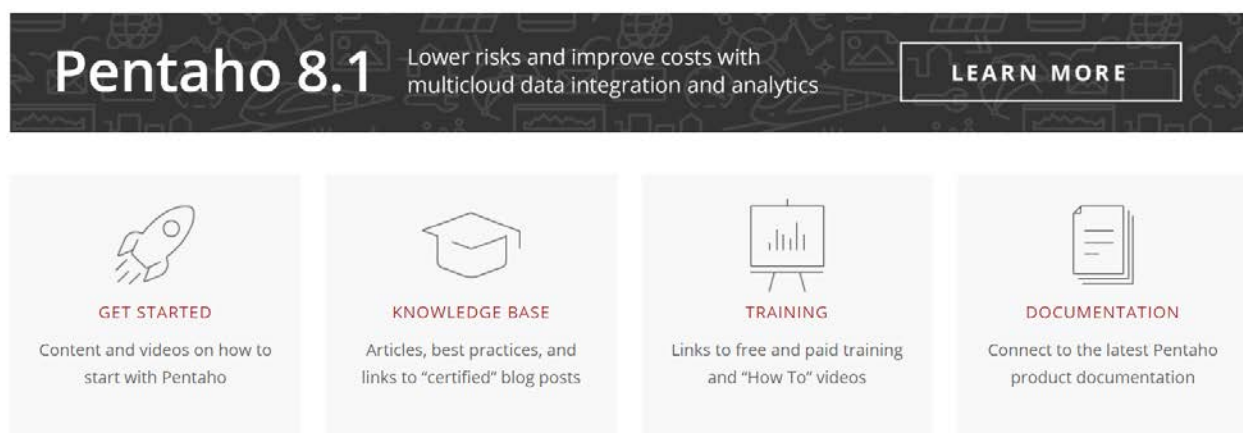
Figure 1: Pentaho Customer Portal

Our Customer Portal gives you access to the following:
- Support Ticketing System for Pentaho
- Content and videos to get started
- Pentaho's Knowledge Base, including Best Practices
- Pentaho software and service packs
- Documentation for Pentaho
- Training resources

A verification email and direct access the Customer Portal will be given to Named Support Contacts[1] only. If you need to provide access to additional personnel within your corporation, contact your Pentaho Customer Success Manager (CSM) or sales representative for additional licenses.

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[1] "Named Support Contacts" means the individuals initially named (together with their contact details) in a Business Summary who are designated as Hitachi's sole contacts at customer for communications concerning Hitachi Support, as changed from time to time in accordance with the terms of a Business Summary.

If you experience any problems using or accessing the Customer Portal, contact the Customer Support staff through the online form.

Knowledge Base for Pentaho

Our Technical Support Engineers create and update Knowledge Base articles daily, including:

- Best Practices
- Links to Pentaho-certified blog posts
- Documented workarounds
- Tips and tricks
- Known issues
- Trouble resolution steps

You can access the Knowledge Base by logging in to the Customer Portal and clicking the **Knowledge Base** widget. If you wish to search for Knowledge Base articles, you can use the **Search** field near the top of the page. The **Documentation** widget on the right will provide access to topics within Pentaho's public facing documentation.

If you would like to receive email notification of updates to individual articles, Best Practices, or general topics, click on the **Follow** button near the top of the page you would like to follow:
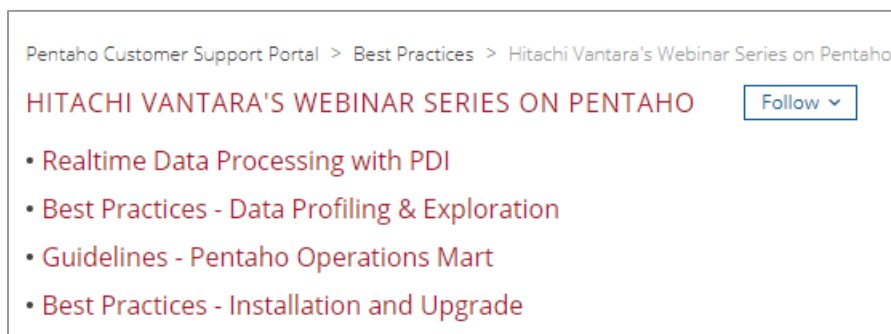
Figure 2: Following a Topic in the Knowledge Base

Pentaho Technical Support

Our support offices are staffed with representatives available from 9:00 AM to 5:00 PM, Monday through Friday. Designated Hitachi Vantara holidays may affect these hours.

Pentaho's 24x7x365 Support is available for Enterprise Support subscription customers. Details can be found at [Technical Support](#) and [Enterprise Support](#).

If you are not sure what type of subscription you have, contact your Pentaho CSM or your sales representative. The following topics are covered in this section:

- [Product Support Overview](#)
- [Hitachi Vantara Support Methodology for Pentaho](#)
- [Production Support](#)
- [Support Service Prerequisites](#)
- [Exclusions from Support](#)

Length of Product Support for Pentaho Software

Hitachi Vantara provides support for each version[2] of the Pentaho software for two years from the date of availability.

The Pentaho Release Product Version Matrices provide an overview of the General Availability (GA) release date for each product. Versions for the sub-components are also included.

- [Pentaho Release Product Version Matrix for 8.x](#)
- [Pentaho Release Product Version Matrix for 7.x](#)

*Software [End-of-Life (EOL) notifications](#) can be found in the Customer Portal. If you want to receive notifications on any Knowledge Base article, including EOL postings, click the **Follow** icon near the title of the article.*

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[2] "Version" means generally commercially released code corrections, patches, and minor version releases of the same software product as designated by a change in the number to the right of the decimal in the version number (e.g. x.4, x.5, x.6).

Production Support

Hitachi Vantara offers Pentaho production support to our customers' Named Support Contact(s) to resolve issues with the software products.

Details on our Severity Levels details can be found in Enterprise Support and Technical Support.

The target response times listed in Technical Support are the times in which Hitachi Vantara will attempt to respond to a support request delivered by a customer's Named Contact. This does not apply to the time it takes to resolve an error, or to finalize the assistance process. Hitachi Vantara may inquire about the root of the problem and request more details. Without this information, we may be unable to resolve the problem.

Named Support Contacts

- Only a Named Support Contact shall be entitled to access the Pentaho Customer Portal.
- Each Named Support Contact must have full administrative access to all files, file systems and databases required for the operation of the Product.
- Named Support Contacts may not forward requests from other parties and must be able to act as the primary contacts for any Pentaho Support issues.
- Each Named Support Contact may access the Pentaho Knowledge Base through the Pentaho Customer Portal.
- Named Support Contacts must communicate with Hitachi Vantara in English.

Support Services Prerequisites

The customer will assist Hitachi Vantara in the performance of support services, upon request. We will also need certain information for the support personnel to determine if a problem is related to an error or another issue.

"Error" is a reproducible and documented error in a Product operating in a Production Environment where a product does not substantially conform to the published documentation. "Reproducible" means a repeatable test case that isolates a particular behavior of the Product on hardware, software platform(s), and other components the Product is designed to be used in conjunction with, in accordance with the published documentation.

The customer will use their best efforts to provide Hitachi Vantara with steps which reproduce and isolate the error. If the customer cannot provide reproduction steps, Hitachi Vantara may be unable to resolve the error. We will still be available to work with the customer to assist in the development of a test case. This effort may be impacted or unsupported for outdated releases.

Hitachi Vantara accepts no support obligations for any products other than Hitachi Vantara products.

When an error is found in the software products, the customer may notify Hitachi Vantara through email or the customer portal, providing a standard description of the problem. The customer must

provide Hitachi Vantara with a continually-available engineer who will promptly assist the support and development organizations with data gathering, testing, and applying all resolutions to the applicable environment for Severity Level 1 (Critical) or Severity Level 2 (Serious) Errors. If Hitachi Vantara cannot duplicate the error, internally, then Hitachi Vantara may request reasonable access to the computing environment in which the error occurred.

Exclusions from Support

Hitachi Vantara takes no responsibility for providing any support services that may stem from any of the events listed below. In no event will Hitachi Vantara assume liability for any failure to meet the target services level for any issues stemming from the following:

- A failure of hardware, equipment, or programs not covered by the contract.
- Software product versions not obtained through the Hitachi Vantara Customer Portal for Pentaho.
- Use in a production environment of any release of the software products not marked as General Availability (GA).
- Any causes beyond the control of Hitachi Vantara, such as floods, fires, loss of electricity, etc. Also, errors arising from anything other than software, such as databases, web-servers, and hardware.
- The customer's failure to comply with operating instructions contained in the documentation.
- Any modification, enhancement, or customization of the software products by anyone other than Hitachi Vantara.
- Installation, configuration, management, and operation of the customer's applications.
- APIs, interfaces, web services, or data formats, other than those included with the software product.
- Any third-party products, excluding those provided by Hitachi Vantara, and those only in support of the specific interface or functionality that is intended by Hitachi Vantara.

Technical Support Process

Hitachi Vantara's method of managing the support cases is driven by three major criteria:

- **Subscription service level**: This is defined based on your Pentaho subscription contract. If you are not sure what type of subscription you have, contact your Pentaho CSM or your sales representative.
- **Severity level**: Specific to each support ticket that you raise with Hitachi Vantara, the level depends on how much impact the issue has on your IT Team, your business, or your end users.
- **Environment**: The environment in which the issue was encountered, such as Production, Development, or Test.

When a new ticket is created, we will ask for the severity level of the case, and in which environment the issue was encountered. Your subscription service level is automatically tracked in our customer management system.

Response Times – Based on Subscription Level and Severity

Targeted response times for each severity level are based on your subscription service level. The time in which Hitachi Vantara will attempt to respond to your service request after notification by a customer's Named Support Contact is shown in Enterprise Support and Technical Support. The time in which the error will be *resolved* may vary.

24x7x365 support for Severity 1 issues is only available for Premium and Enterprise Support subscription customers. For other customers, your Severity 1 issue will be responded to during the next business hour, which might mean Monday morning the following week.

Support Case Triage

Hitachi Vantara Support's goal is to provide a resolution or a workaround for customer issues as quickly as possible, taking the severity of the issue and its impact to the customer into consideration.

Newly received support cases are triaged and distributed to the next support engineer trained within the product area that the issue was submitted for. The assigned support engineer will contact the customer within the allotted time defined by the Service-Level Agreement (SLA).

Please note that only Named Support Contacts, as defined in our contract, will be contacted by our support team.

Tickets Submitted During Business Hours

These tickets are assigned to the next available support engineer in the product area identified in the ticket. A support engineer may contact the customer by phone to clarify the issue, and immediately start working on the case. If the customer cannot be reached by phone, we will contact the customer through our ticket management system.

Outside of Business Hours, After-Hours, and Global Holidays

Tickets submitted after-hours or on global holidays will be picked up on the following business day. In case of Severity 1 issues for Enterprise customers, the on-call support engineer will respond to the issue and follow the process as described:

- **Issue Escalation Process**
  - o The customer may escalate a support services issue if Hitachi Vantara does not respond to any of the customer's support requests submitted through the documented channels, or if the customer is concerned with the progress or resolution of a reported Support Services issue.
  - o It is best to escalate an issue by sending an email to escalation.pentaho@hitachivantara.com, which will automatically notify our escalation management team and create a support ticket to track its progress.
  - o You can also contact Hitachi Vantara using the toll-free hotline, at 866-435-0931. Our goal is to respond to all escalations within four business hours.
- **Product Issue Triage**
  - o The support engineer is required to create a detailed production path in a controlled environment, if an issue is suspected while troubleshooting.
  - o Reproducing a possible issue depends on making sure the correct software, databases, and drivers are installed, similar data is used, and the environment is configured in the same manner. This can sometimes make the troubleshooting process challenging and time-consuming.
  - o If the issue is reproduced and a defect is suspected, an engineering issue ticket is created in our JIRA system and goes through Product Issue Triage.
  - o Once an issue is identified as a product issue, it is reviewed by Hitachi Vantara's Triage team.
  - o During the triage meeting, the issue ticket is reviewed. It will either be tentatively scheduled for a resolution, made available with a new product release, or assigned back to the support team or other individuals for follow-ups. Some product issues are resolved through a service pack release. The section on [Pentaho Service Packs](#) has more details about those processes.

Issue Reporting

The best way to report an issue to the Hitachi Vantara Technical Support team is by submitting a ticket through one of the following:

- The Hitachi Vantara Customer Portal for Pentaho
- Email: support.pentaho@hitachivantara.com

You may be able to troubleshoot the issue if you increase your logging levels. Our Support Team may ask you to increase logging levels as part of the troubleshooting process. Make note of any steps to reproduce the issue.

You must be set up in our system as a Named Support Contact, in all cases. Hitachi Vantara sends Customer Portal credentials to Named Support Contacts within 24 hours after your contract is processed. If you are a Named Support Contact and you do not have your login credentials, contact your sales representative or CSM.

This is the information covered in this section:

- Submitting a Ticket Through the Customer Portal
- Emailing Support to Submit New Tickets
- The Life of a Support Ticket - Timeline

This table provides a list of the information that you might need when filling out a ticket with Hitachi Vantara Support for Pentaho:

Table 1: Environment Checklist

Environment	Notes/Details
Operating System	
Memory Available/Used	
Hardware	
Clustered Environment?	
Virtualized	
Database used for repository	
Database used for data	
Browser type and version number	
Load balancer, if applicable	
Proxy, if applicable	
Environment hosted in	

Submitting a Ticket Through the Customer Portal

We recommend using the [Hitachi Vantara Customer Portal for Pentaho](#) to submit issues to our Technical Support Team. After you successfully log in to the Customer Portal, click on **Submit a request** to get started with your support ticket.

Figure 3: Submit a Request

When you finish filling out your support request and uploading related files, click **Submit**.

Emailing Support to Submit New Tickets

To submit a new ticket without using the Customer Portal, send an email to support.pentaho@hitachivantara.com. The system will only process emails from Named Support Contacts. You will receive a confirmation email from our Customer Portal providing you with a ticket number.

*Be aware that you are not able to specify a severity in an email. The issue will be automatically logged under the **Moderate** severity level until the case has been reviewed. We **strongly** encourage you to submit **Severity 1** issues through the Customer Portal and set the severity level accordingly.*

Email Notification About Ticket Activity

You will receive email notifications every time your Support ticket is updated. You can reply or forward additional information by replying to the email notification, or by sending an email to support.pentaho@hitachivantara.com. Reference your ticket number in the Email's **Subject** field, as shown:
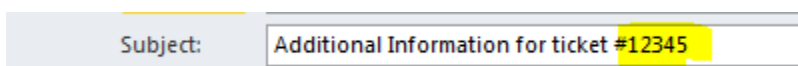

Figure 4: Subject Line

You will also receive automated email reminders from our Support system if we do not hear from you within a certain time frame.
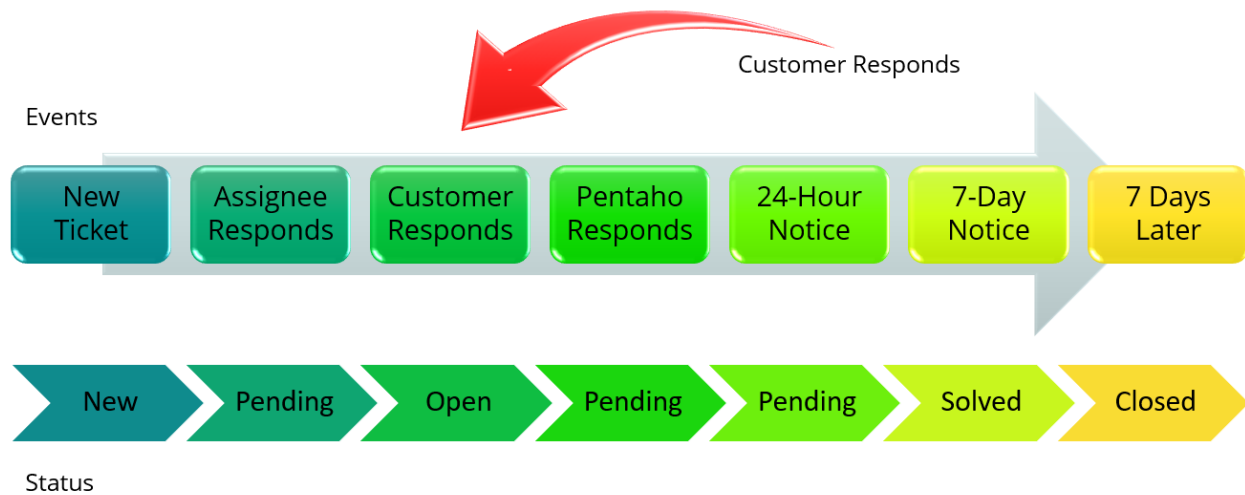
The Life of a Support Ticket – Timeline

Figure 5: Ticket Status Timeline

During the life of a ticket, you will receive several automated emails from the ticketing system, informing you of the status of the ticket.

The Automated Closure process is suspended for tickets that are Escalation Tickets, or tickets for which a software issue has been identified.

Table 2: Automated Email Schedule

Time Frame	Description
24 hours after ticket status is Pending	System sends you an email informing you that Hitachi Vantara is waiting for feedback.
7 days after ticket status is Pending	System sends an email informing you that Hitachi Vantara has been waiting for feedback for 7 days and will consider the issue **Solved** if we receive no response. You can reply to the email with **keep open** and the ticket status will be changed to **Open**.
24 hours after ticket status is set to Solved	System sends you a survey requesting your feedback. Please take a few moments to respond and let us know how we did.
7 days after ticket status is set to Solved	Ticket status is set to **Closed**. At this point, the ticket cannot be reopened. A new ticket or follow-up ticket must be submitted if you are still experiencing the issue.

Downloading and Installing Pentaho Software

There are different ways to install Pentaho software, depending on your business needs and production environment[3]. The following sections will guide you through the installation and downloading processes used for Pentaho.

- [Installation Methods for Pentaho Software](#)
- [Download Pentaho Software](#)
- [License Files and License Installation](#)

Installation Methods for Pentaho Software

The following will help you determine which installation method you should choose:

- **Archive Installation**: This is our recommended installation method. It either installs all components, or only those selected. You can choose your own repository type with this method, but you must download and install it yourself.
- **Manual Installation**: This method either installs all components, or only those selected. You can choose your own repository type and web application server with this method, but you must download and install them yourself.

Complete instructions and details about each installation method can be found in [Pentaho Documentation](#).

Download Pentaho Software

You can find the proper software for your installation method in the **Downloads** section in the [Pentaho Customer Portal](#).

Keep these things in mind before you begin:

- Your Customer Portal account login should be verified.
- Your web browser needs to support Flash.
- Our downloadable software components are hosted on [Box](#).

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[3] "Production Environment" means any computer system running one or more instances of the Product that a) is being actively used to process data or provide information to the system's users, and b) is not being used for development or testing purposes.

Click on the version[4] you want to use, and then navigate to the software you want to download using the embedded widget near the bottom of the software page.
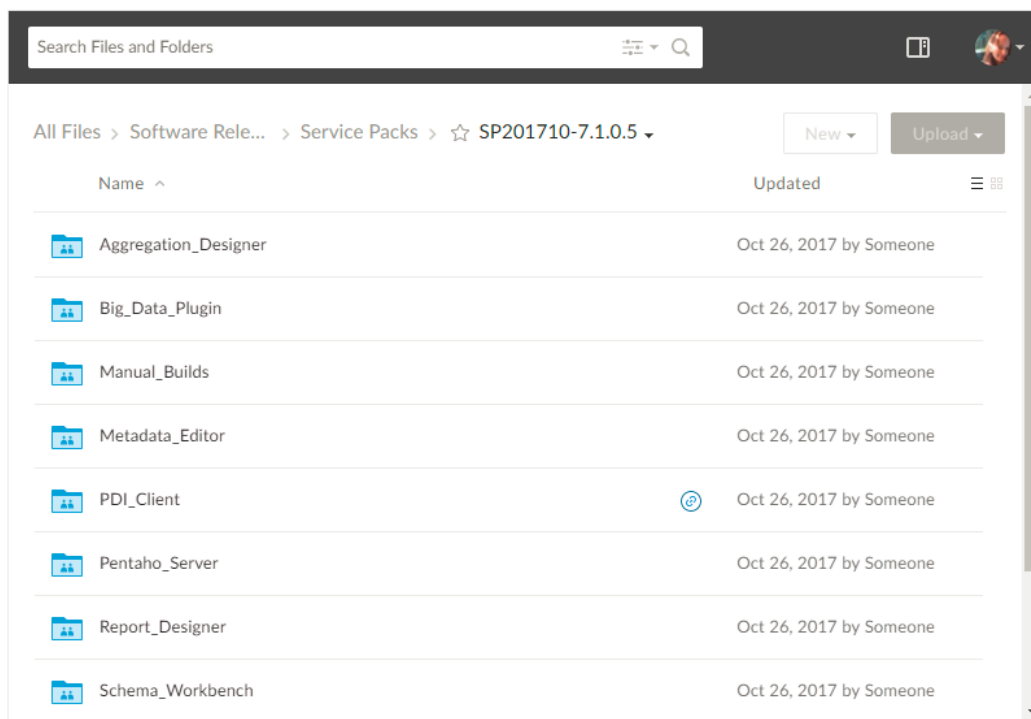

Figure 6: Download Widget

If you cannot access Box, we have a Secure File Transfer Protocol (FTP) server available for downloading Pentaho software. You should have an FTP-capable client to help establish a connection. Contact Hitachi Vantara Technical Support if you need more details about downloading from the FTP server.

New versions of Pentaho, as well as software patches, are available the day of release on Box. They are available within a couple of days after release on the FTP server.

The Evaluation version of Pentaho can be found on our website.

License Files and License Installation

The license files in your Welcome packet are valid for 60-days, and will help you begin your installation. When we receive payment for your subscription, we will send you permanent license files, which will expire on the last day of your subscription. You can find instructions for working with licenses in the Installing or Updating License Keys documentation.

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[4] "Version" is a generic term for code corrections, patches or hot fixes, Service Packs, Maintenance Releases, Minor Releases, and Major Releases of the same Product generally made available to Hitachi customers.

Pentaho Service Packs

For identified issues, Hitachi Vantara regularly provides Pentaho service packs to our customers. Service packs are not a vehicle for new features or new installer capabilities.

Versions Covered by Service Packs

Hitachi Vantara provides Pentaho service packs for the current maintenance version of the **current major release**, and the current maintenance version of the **previous major release** of our products. Releases are defined as follows:

- **Major Release** – means the major releases of the Product generally released to Hitachi Vantara customers and designated by a change in the first digit of the Product Version number (e.g., 6.x, 7.x, 8.x).
- **Minor Release** – means the minor version releases of the Product generally released to Hitachi Vantara customers and designated by a change in the number to the right of the decimal after the Major Release number (e.g., x.1, x.2, x.3).
- **Maintenance Release** – means the maintenance releases of the Product generally released to Hitachi Vantara customers and designated by the change in the number to the right of the decimal after the Minor Release number (e.g., x.x.4, x.x.5, x.x.6).
- **Service Packs** – means the service packs for the Product generally released to Hitachi Vantara customers and designated by the change in number to the right of the decimal after the Maintenance Release number (e.g., x.x.x.4, x.x.x.5, x.x.x.6).

Service packs may not be made available for all versions or products that are eligible for service packs. Our focus is to address issues related to the current version of our software. We will address issues in our previous version based on severity, security vulnerability, data-related issues, and customer impact.

Severity 1 Issues and Service Packs

Severity 1 issues that have no workaround available will be handled outside of our service pack process. We will provide an error correction for these issues as soon as possible.

Service Pack Q&A

Who is eligible to receive service packs, and where can I find them?

Service packs are available to all Hitachi Vantara customers who have an active Pentaho subscription. A complete listing of our available service packs can be found on the Downloads page in the Hitachi Vantara Customer Portal for Pentaho. If you would like to be notified when there is a new service pack available, click on the **Follow** icon near the top of the page.

How often are service packs released?

Hitachi Vantara provides monthly Pentaho service packs for the versions identified in this section. Our goal is to make these service packs available to our customers on the second-to-last Friday of every month.

Hitachi Vantara Virtualization Support Statement

Hitachi Vantara supports virtualization technology throughout our Pentaho BI Suite. Hitachi Vantara will support customers who run Pentaho products on supported operating systems and minimum hardware requirements, whether they are running in virtual environments or not. The customer will be responsible for any failures caused within the hardware or operating system layer because of their misuse of the virtualization software.

Hitachi Vantara will not require customers to recreate and troubleshoot every issue in a physical (non-virtual) environment; however, Hitachi Vantara reserves the right to request customers to diagnose certain issues in a native supported operating system environment, operating without the virtual environment. Hitachi Vantara will only make this request when there is reason to believe that the virtual environment is contributing to the issue.

Any time spent on investigating problems that may be related to virtualization will be handled in the following fashion:

- Hitachi Vantara will provide standard support for all its products.
- If a problem is encountered while Pentaho products are running in a virtual environment, the customer may be required to recreate the problem on a physical (non-virtual) server unit, at which time Hitachi Vantara will provide regular support.
- The customer can authorize Hitachi Vantara to investigate the virtualization-related items at normal time and materials rates. If the investigation shows that the problem is related to the virtualization, the customer may contact Hitachi Vantara to provide a software change to resolve the issue if a resolution is possible.
- If the problem is determined to be unrelated to virtualization, the time spent on investigation and resolution will be covered as part of regular maintenance, and support will be provided as usual.

While the Pentaho applications are expected to work properly in a virtual environment, there may be performance implications which may or may not be caused by the virtualization and do not fall under this support statement.