CLOUDSOFT

Support Portal Guide

Overview

The support portal is accessible at: https://support.cloudsoft.io.
Only pre-registered users, managed by Cloudsoft, are able to access this portal to raise and view tickets for their organisation..

The support portal is used to formally request that work be done by Cloudsoft, from fixing an urgent problem through to exploring price options. For more information, see the *Customer Interaction Guide*.

All changes to the production system should go through the support portal to ensure an audit record and additional security. This includes even simple requests such as "please reset my password". Subsequent discussion may take place through other mechanisms, with summaries and links recorded against the issue.

For quick reference, the key points are summarised below:

- Ticket types:
  - To report an incident, create a ticket of type 'Incident' and the appropriate priority (e.g. 'Urgent', 'High', etc), as per the terminology agreed in the SLA.
  - To request a change to the production system, create a ticket of type 'Task' and the appropriate priority (relative to the other tickets).
  - To request an exploration, create a ticket of type 'Question'.
- As per the SLA, Cloudsoft engineers will only be paged (24/7) for tickets of type 'Incident' with sufficiently high priority.
- The ticket states are 'New', 'Open', 'Pending', 'Solved' and 'Closed'.
  'Open' means it is with Cloudsoft to solve it; 'Pending' means the ticket is assigned to the customer to answer a follow-up question.

Onboarding

An *organization* will be set up for the customer, along with *users* within that organization.

The standard setup is a separate user account per customer employee, with permissions to see all tickets within that organization. When a user is added, they will

receive an email. This will include a link, allowing initial login and password setup. Likewise, authorised users can be removed on request when they moe to another role or leave the company for example.

An additional "virtual user" can also be created, linked to an email group alias from the company. When a ticket is created by Cloudsoft on behalf of the customer, the ticket would be created as though by this virtual user (emails will be sent to the email group alias). The ticket will indicate why it was created (e.g. specific person at customer who requested it, or automated process that detected a fault). The customer should provide a group alias email address for this purpose.

Alternative Configuration: Company-wide registration

The support portal can also be configured to allow all users with an email address in a given domain to register. For example, the Acme Corp organization could be configured such that anyone with an acme.com email address can create a user.

Alternative Configuration: Shared User

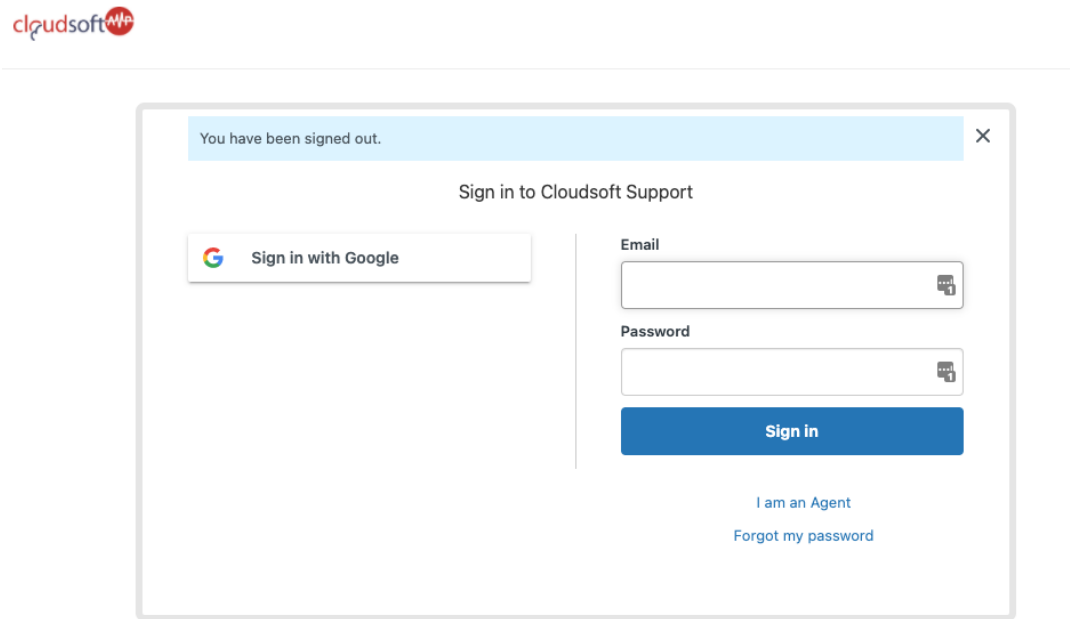
The support portal can also be configured such that all customer employees share the same login. This can be used in combination with a group alias email address.

However, this setup is discouraged: the anonymity of tickets can cause problems for both the customer and Cloudsoft (e.g. the audit trail is incomplete and unverified). If this setup is used, it is strongly recommended to self-identify whenever creating or commenting on a ticket.

Basic Usage

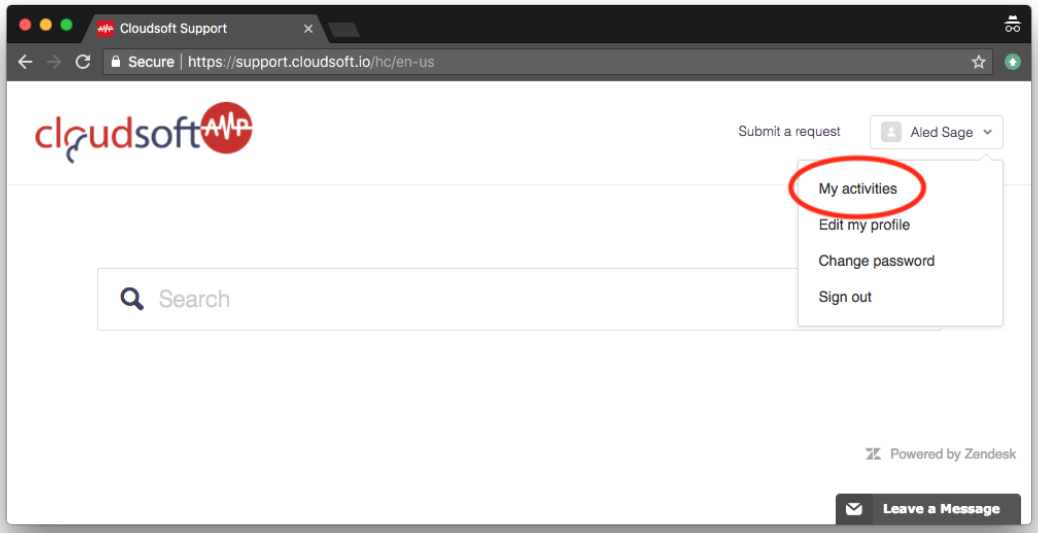
Login

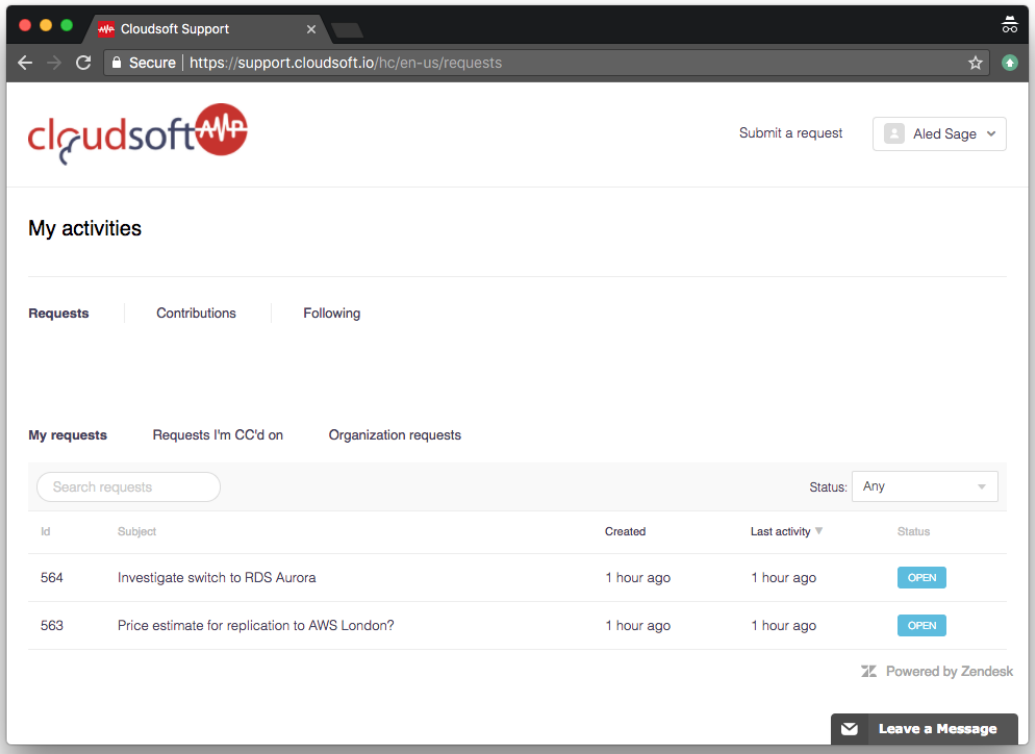
Login to https://support.cloudsoft.io, using your email and password as setup during onboarding.



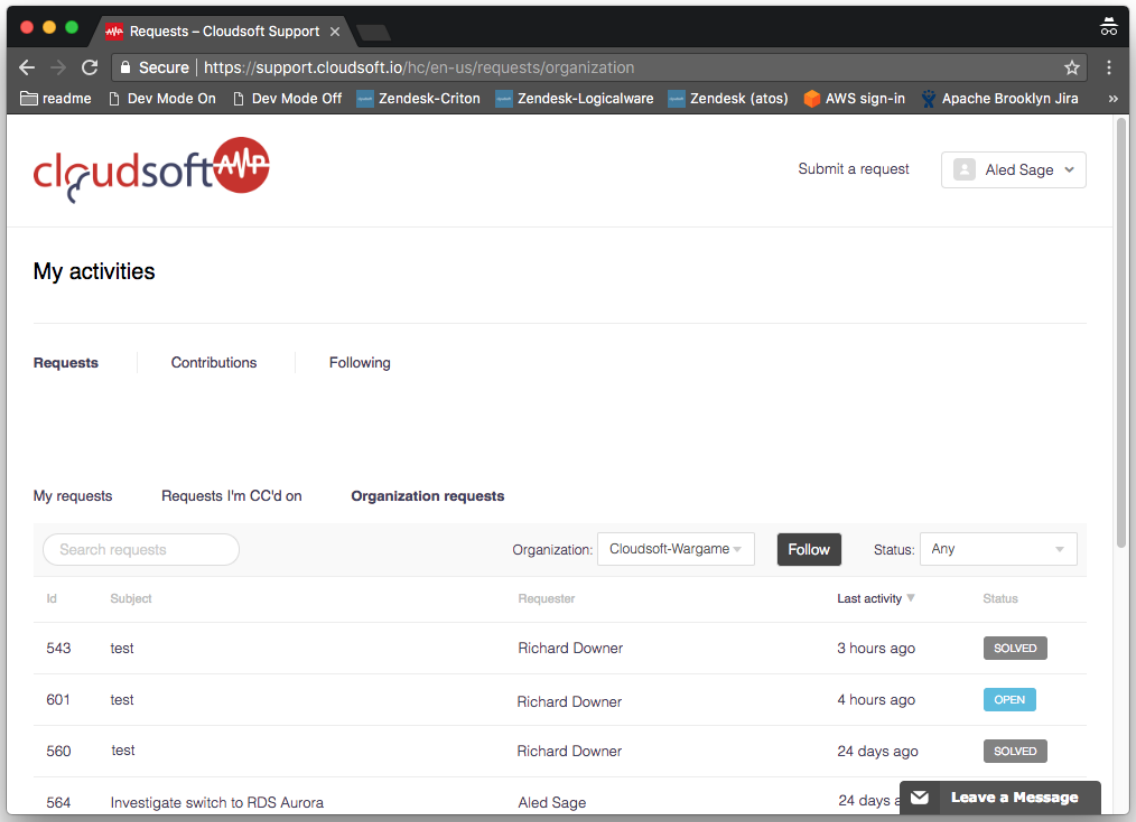
View Tickets

From the drop-down in the top right, select “My activities”. You will see a list of your tickets. Click on a given ticket to see more details.



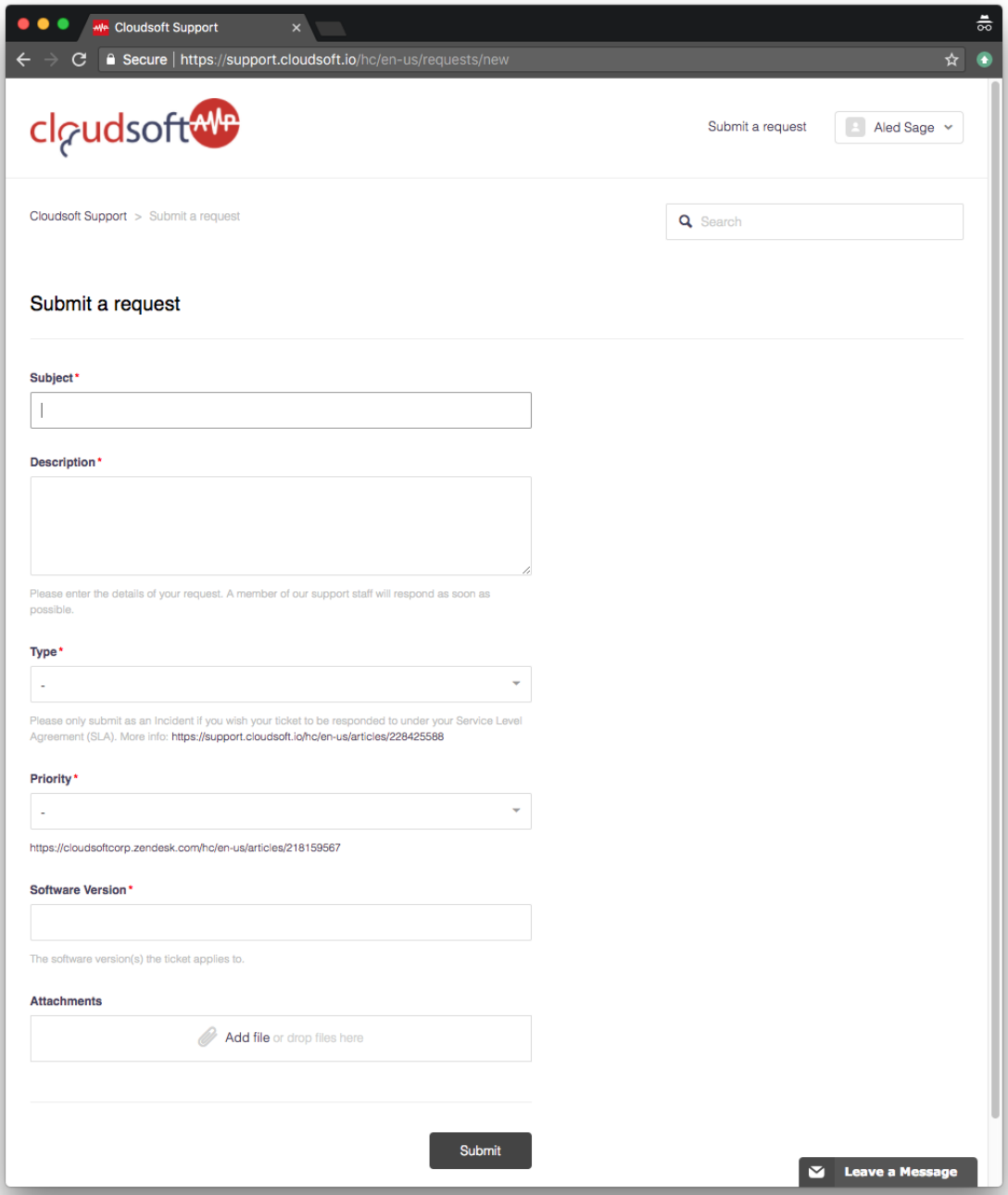


To view and comment on tickets created by others in your organization, click on the "Organization requests" tab.



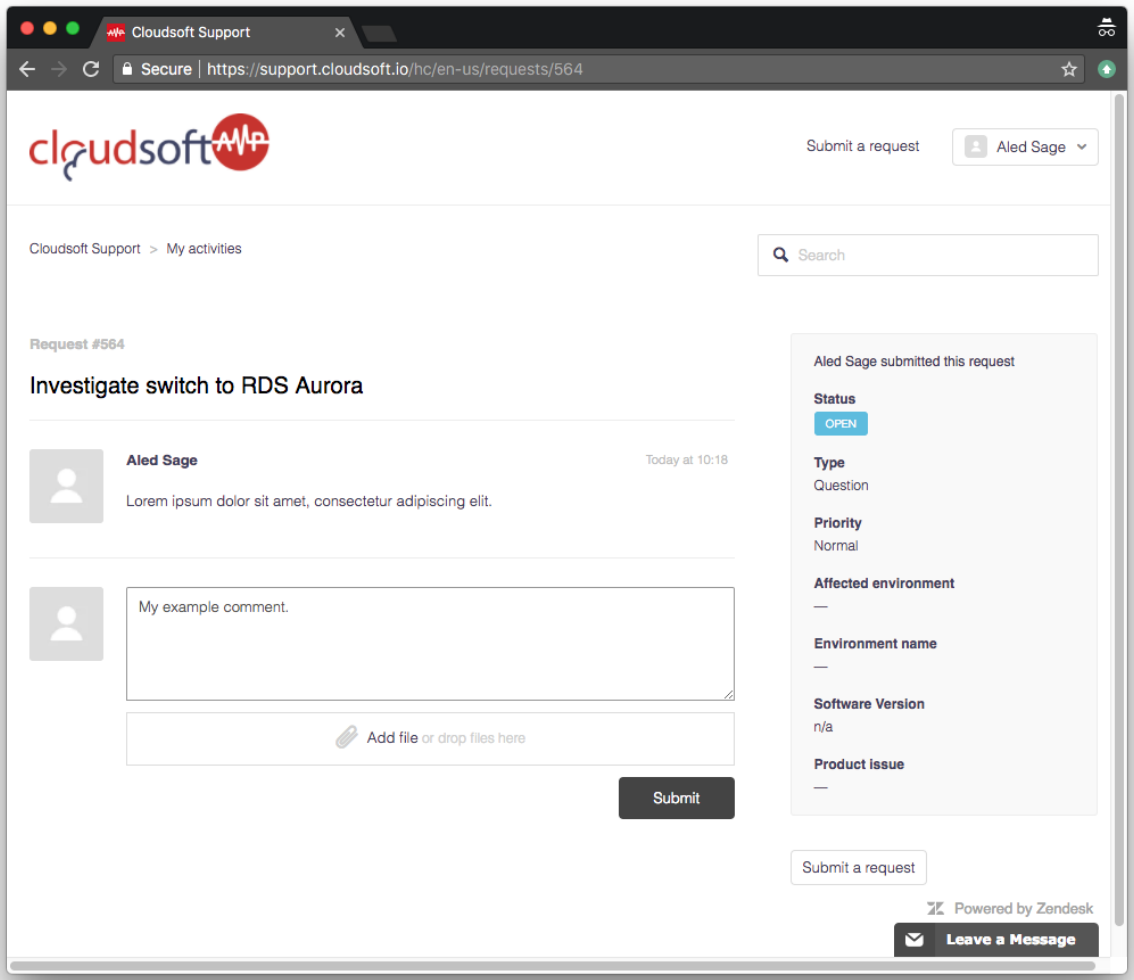
Create Ticket

Click the “Submit a request” link in the top right, fill in the form, and click Submit.



Comment on a Ticket

To comment on a ticket, first open the ticket by clicking on it. Type your comment into the text box provided, and click the “Submit” button.



Authority of Requesting a Change

Part of the onboarding process, the customer will need to provide who has authority of requesting changes to the production system. Whether a pre-approval process is put in place before reaching the Cloudsoft Support Portal. Whether a dedicated approval process is put in place within the Ticket lifecycle. Or whether the customer approval must be done once the ticket has been submitted.

Automatic Ticket Creation

Automatic monitoring and alerting systems may be put in place alongside the customer able to raise tickets. Those systems will automatically create and raise tickets upon certain rules if there were an issue within the customer workloads. The customer can choose who they would need to be notified with a certain group alias email for example.

Ticket Types

Report an Incident

Incidents are normally detected automatically, based on monitoring the health and SLOs of the application. However, customers can also notify Cloudsoft of problems.

Create a ticket of type 'Incident'.

The priority of the incident should be given (e.g. 'Urgent', 'High', etc), as per the terminology agreed in the SLA. This will alert Cloudsoft, as appropriate. Note that only type 'Incident' will page Cloudsoft engineers, day or night. If a response is required as per the SLA, use type 'Incident'.

A good description of the problem is also required in order for Cloudsoft to speedily and efficiently resolve the issue. For example, this should describe the behaviour observed, when it happened, and any other useful information such as the exact error message, the request that gives the error, etc.

Request a Change

A change to the production application can be requested. For example, upgrade a software component.

Create a ticket of type 'Task'.

The priority indicates the urgency, relative to other tickets.

For non-trivial changes to the architecture, it is strongly recommended that an "Exploration" be done first - see below.

Request an Exploration

An "exploration" is where Cloudsoft look at the feasibility of a suggested change (e.g. moving the database to AWS Aurora).

Create a ticket of type 'Question'.

The priority indicates the urgency, relative to other tickets.

The description should describe the scope of the exploration, and the desired deliverable (e.g. is it a document describing the risks and benefits, or is it a proof of concept where the system is deployed and tested in the QA environment).

A 'Question' could also be a lighter weight query, which Cloudsoft can answer without an "exploration".

Ticket Lifecycle

A ticket has the following states:

- New: the ticket has been received, but not yet assigned to a Cloudsoft ‘agent’.
- Open: the ticket has been assigned, and is with Cloudsoft to resolve it.
- Pending: the ticket has been reassigned to the requester (i.e. the customer), to answer a follow-up question.
- Solved: the agent has resolved the ticket.
- Closed: the ticket is complete, and cannot be reopened (however, a follow-up ticket can be created).

Whenever the customer comments on a non-closed ticket, its state will automatically change back to 'Open'.