IBM Internet Security Systems
Support Way guidelines

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The mission of the IBM Internet Security Systems™ (ISS) Customer Support department is to "wow" our clients through a quality approach. When you need assistance, we want to provide thorough and timely responses to help ensure that each interaction is as productive and as efficient as possible. Whether you call, e-mail or visit the Customer Support Portal, our goal is to provide you with premier service.

Each Customer Support Analyst at IBM ISS not only receives extensive technical training but also is trained on the IBM ISS Support Way. The IBM ISS Support Way comprises the guidelines we use when interacting with our clients. This formula helps ensure that you receive a high-quality support experience.

Phone interaction

Confirming client identity and maintenance agreement

After being greeted, your identity will be confirmed. Generally, this is verified by ensuring that the name you've given is also listed as one of the Designated Contacts on the company record. Additionally, you may be asked to confirm your phone number and/or e-mail address to both verify your identity and substantiate that we have the correct information for future correspondence. To verify your maintenance agreement, you may be asked for your product's OCN number.

Confirming client priority

It is imperative that the priority of your incident is confirmed. Using his or her expertise, the Analyst will assign a priority (medium, high or critical) that is appropriate for the severity of the issue. The Analyst will also confirm with you that the assigned priority is acceptable. If you disagree and feel that the impact to your business is not reflected in the assigned priority, the priority will be changed.

Denied Parties List

For the sake of national security, IBM ISS is mandated by the federal government to maintain a Denied Parties List. This list comprises countries/organizations with which we are prohibited from doing business. If a caller is on the Denied Parties List, we cannot provide service. When this happens, a member of the Customer Support management team will verify that the caller is indeed on the Denied Parties List and will address the issue with the caller.

Phone protocol

When Analysts interact with you on a call, they will follow the guidelines below to help ensure your satisfaction:

- Direct the conversation to help ensure that all aspects of the incident are dealt with.
- Respond with the appropriate sense of urgency.
- Maintain a professional demeanor.
- Assure you that your incident will be addressed.

Technical instructions

All technical instructions that are given to you will be explained and documented thoroughly. The instructions will be presented in numbered steps or bullet points so they are easy to understand. After the instructions are given, the Analyst will confirm with you that the procedure was performed correctly.

Ending a call (issue not resolved)

If the issue is not resolved during the initial phone call, the Analyst must provide you with the following information before ending the call:

- Summary of the current issue
- Current plan of action
- Next plan of action
- Outstanding action items

Ending a call (issue resolved)

When an incident is resolved during the phone conversation and no subsequent action is required, the Analyst will confirm with you that the issue has indeed been resolved by covering the following points:

- Confirmation that the issue has been resolved
- Notification that the incident is being closed (if the same issue occurs within two weeks, the incident can be reopened; after two weeks, a new incident will be opened to address the issue)

E-mail and/or Customer Support Portal interactions

When an incident is initiated in the Customer Support Portal or an e-mail is sent to support@iss.net by a Designated Contact, an incident will be opened and assigned to an Analyst.

Closure notice

Once an incident is created, the Analyst will make multiple attempts to contact you. If no response is received, the following steps will be taken to help ensure that you are given sufficient opportunity to respond:

- When an incident is created, you will receive an automatic e-mail response with the incident number.
- Next, the Analyst will e-mail you.
- If no response is received after one day, the Analyst will e-mail you again.
- If no response is received after an additional day, the Analyst will call you and, if unable to make contact, leave a voicemail asking for a response and letting you know that the incident will be closed in 48 hours if there is no response. The Analyst will also send an e-mail stating the same.
- After 48 hours, the Analyst will notify you via e-mail that the incident is closed.

Confirming client priority

As with phone interactions, the Analyst will assign a priority (medium, high or critical) to the incident appropriate for the severity of the issue. The Analyst will also seek to confirm with you that the assigned priority is acceptable. If you disagree and feel that the impact to your business is not reflected in the assigned priority, the priority will be changed.

Technical interactions

The Analyst will attempt to gather as much information about the incident as possible in the first e-mail to you. It is common for us to request multiple logs. The reasons for doing this include the following:

- Several requests through e-mail can be time consuming.
- Some issues have multiple symptoms that require the examination of multiple logs to identify the issue.

As with phone calls, all e-mail instructions to you will be explained and documented thoroughly. The instructions will be presented in numbered steps or bullet points so they are easy to understand. After the instructions are given, the Analyst will confirm with you that the procedure was performed correctly.

Changing delivery method

In some cases, e-mail may not be the most efficient way to resolve an issue. If it is evident that this form of communication is not productive, the Analyst will call you to discuss the issue. If you are not available, the Analyst will leave a voicemail requesting that you call back when you are available to address the issue. Additionally, when e-mail or phone correspondence is not productive, the Analyst may suggest a GoTo Assist session, in which the Analyst is able to provide remote support by sharing your desktop.

Closing a slow response incident

When the progress of an incident becomes stagnant because of your availability—for example, vacation or higher priorities—the Analyst will recommend, via e-mail, that the incident be archived or closed until you are available.

Closing incidents

The Analyst will always notify you before closing an incident by sending you an e-mail with a brief synopsis of the resolution. You should be advised that the complete resolution can be found in the notes of the incident. However, if you close an incident without any indication as to how the issue was resolved, the incident notes will reflect the following:

"Closed by Client – Resolution Unknown"

Confirmation pending closure

When the Analyst is confident that the information given to you will resolve your incident, the status of the incident will be set to Confirmation Pending. At this time, you will be advised that the incident will be closed in 24–48 hours unless you contact us to indicate that your issue was not resolved.

Incident notes

Throughout the life of an incident, it is important that all pertinent details concerning the issue be included in the incident notes. To make certain that your issues are properly documented, the incident is updated every time you correspond with an Analyst. Any updates or steps taken to resolve the issue are included in the notes. Additionally, if an Analyst leaves a voicemail, this is also noted in the incident.

Incident lifecycle

Once an incident is created, the Analyst sets the status according to the progress of the incident.

- Logged — A client has called or left an e-mail; it has not been addressed by an Analyst.
- Awaiting Client — We are currently waiting on information from the client.
- Investigating — The Analyst is actively working on the incident.
- Awaiting Internal — The Analyst is waiting for information from an internal source.
- Submitted to Senior — The incident has been escalated to a Senior Analyst.
- Submitted to EE — The incident has been escalated from a Senior Analyst to an Escalation Engineer.
- Closed — The incident has been closed.

Issue/Action/Next Plan of Action

After any interaction with you, the incident notes will contain the following information:

- Issue — The current issue you are trying to resolve
- Action — What is currently scheduled to happen before the next interaction
- Next Plan of Action — The next step after the action listed above has been performed

Setting expectations

For incidents to be resolved in a timely fashion, it is imperative that you and your Analyst are both aware of the next steps in the resolution process. Because an issue may not always be resolved within the initial interaction, the Analyst may request more information from you. If this is the case, the Analyst will inform you if anything needs to be done on your part, such as generating and sending logs or screen shots. When requests such as these are made, it is essential that you respond with the requested information as soon as possible so that your issue can be addressed promptly.

Investigative notes

During the issue investigation, the Analyst will document the research that was conducted and its results. Supporting documentation—such as log snippets that include error messages or reveal configuration problems—will be included in incident notes but not always visible to you. Accordingly, if the issue is not detected, this is also indicated in the incident notes. You will be contacted throughout the investigation on the status of the incident.

Incident escalations

IBM ISS Customer Support Analysts are very skilled and have several outlets to research your issues. However, when an Analyst cannot resolve an issue, the incident will be escalated to a Senior Customer Support Analyst. If the Senior Analyst cannot resolve the issue, the incident will be escalated to the highest level of Customer Support Analysts—the Escalation Analysts. Very few incidents reach this level of escalation. However, when they do, it is usually a product issue that must be resolved by the product engineers. The Analysts will attempt to provide you with a workaround if possible. Nevertheless, as with any incident, you will be kept abreast of the status of the issue.

Customer Support policies and procedures

For more information, please see the Customer Support Policies and Procedures document at http://documents.iss.net/support_policy.pdf. In it you will find information on other Customer Support topics, including the following:

- Support level offerings
- Service level agreements
- Incident priority definitions
- Maintenance requirements
- Incident management

Customer Support management contact information

Please see the Customer Support Policies and Procedures document at http://documents.iss.net/support_policy.pdf for management contact information as well as more information on Customer Support.

About IBM Internet Security Systems

IBM ISS is the trusted security advisor to thousands of the world's leading businesses and governments, providing preemptive protection for networks, desktops and servers. An established leader in security since 1994, the IBM ISS protection platform automatically protects against both known and unknown threats, keeping networks up and running and shielding clients from online attacks before they impact business assets. IBM ISS products and services are based on the proactive security intelligence of its IBM Internet Security Systems X-Force® research and development team—a world authority in vulnerability and threat research. The product line is complemented by comprehensive IBM Managed Security Services and IBM Professional Security Services.

For more information, visit www.ibm.com/services/us/iss or call 1 800 776-2362.

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Produced in the United States of America
06-07

GTJ01460-USEN-00