

# One Identity Support Guide

## Overview

The One Identity Support team provides world-class support. Excellence in customer support goes beyond just providing technical answers. It is about building trusted relationships and ensuring your success. Our philosophy is simple: We are customer advocates. Our support team is made up of professionals from various industries and backgrounds, who are experienced in technology management and have comprehensive knowledge of our extensive portfolio of software, appliances and cloud services. We recognize how important our products are to the security of your business, and we strive to help you maximize your software investment.

## Social Media and Communities

We also provide real-time assistance on social channels and community forums. Our dedicated support engineers participate in community discussions to provide a proactive approach to helping you quickly find the answers you need. We encourage you to participate in our [One Identity Community](#) by sharing your knowledge and promoting content you find helpful.

## Global coverage and supported languages

One Identity Support offers worldwide coverage, with support engineers located across three geographic regions: North America, Europe and Asia Pacific. These centers provide assistance in English with local language accommodated when possible.

## Commitments to Customer Satisfaction

Information gathered from surveys has a direct impact on our support programs and the service we provide. This information is used to make changes that will directly enhance our ability to continue to deliver world-class support.

### Transactional email-based survey

We strive to continually improve our service to you; therefore, every time a case is closed, we provide you with the opportunity to give us feedback on the quality of assistance received. The survey asks you to assess the engineer's performance as well as your overall satisfaction with how your case was managed.

The Support Management team reviews your response to ensure that all **your feedback is heard and addressed**, as needed.

### Solution feedback

We provide a survey in our Knowledge Base section of the Support Portal to help us understand if the information we provided was useful in your situation. We continuously monitor this feedback and make adjustments and updates to solutions as required.

## One Identity Support Services

One Identity Support provides solution support to suit any business organization. Whether there is an issue with software, the hardware part of an appliance solution or one of our cloud-delivered technologies, our support engineers will collectively work to resolve the issue. We recognize how important our products are to your business environment, and we strive to help you maximize your software investment by offering wide range of global support services to accommodate the varying needs of your organization.

With all the support offering levels, you will have access to trained One Identity support engineers as well as access to our comprehensive self-service Support Portal.

Requests for assistance may be logged from our Case page in the portal (preferred) or by telephone.

### Standard Support

Standard Support is available during regular business hours for a single geographic region as defined by the support region (Americas, EMEA or Asia Pacific) on the Contact Technical Support page of our Support Portal.

With the purchase of Standard Support, you will receive the following elements of service:

- Unlimited 24x7 access to our Support Portal
- Technical support resources available during local business hours
- Access to online forums, documents, videos and Knowledge Base
- Online case management
- Basic how-to troubleshooting
- The latest software/ firmware upgrades
- Unlimited phone support
- Support is provided in English with local language accommodated when possible

## 24x7 Support

24x7 Support is the appropriate option if you require around the clock support coverage or support across multiple time zones. This service provides 24x7 support for severity Level 1 issues, including weekends and public holidays. All other severity level issues will be handled during local business hours.

24x7 Support is essential if you are performing critical IT operations. 24x7 Support is available for most of your products and mandatory for select products. Contact your regional sales/account representative for further details.

You will receive the following:

- All the features included with Standard Support across all regions.
- Technical support resources 24x7 for severity Level 1 issues.
- Support calls will be handled by regional support teams during local business hours and managed by the global support queue outside these hours.

### Premier Support

Our highest levels of service are designed for organizations with complex environments that require a close day-to-day relationship with our support team and a more proactive approach to technical assistance.

Customers who select Premier Support receive **faster response times**, accelerated access to senior engineers and subject matter experts as well as a **designated Technical Account Manager (TAM)**.

Premier Plus includes:

- All the benefits of Premier Support
- An Advanced Support Engineer (ASE)

Note that ASE's are purchased per product and are available on different tiers.

SUPPORT FEATURES	Standard support	24x7 support	Premier support
Maximum response time for severity Level 1 issues	1 hour	1 hour	30 minutes
Technical support coverage ( <i>product-level based</i> )	Local hours	24x7 <sup>1</sup>	Local hours or 24x7 <sup>2</sup>
Online forums, documents, videos and Knowledge Base	X	X	X
Online service request management	X	X	X
Basic how-to and troubleshooting assistance	X	X	X
Latest software/firmware upgrades	X	X	X
Phone support	X	X	X
Email support	X	X	X
Chat support	X	X	X
Faster response times, escalation and resolution			X
Accelerated access to Senior engineers and subject matter experts			X
Designated Technical Account Manager			X
Proactive product updates and knowledge sharing			X
Monthly review calls and status reports			X
Single point of accountability to engage One Identity resources			X
Onboarding assistance, enablement and product adoption			X
Proactive prevention of issues and mitigation of risk			X

Support is provided in English with local language accommodated when possible. There are some products that require 24x7 Support. See your sales account representative for details.

<sup>1</sup> For severity Level 1 issues, support calls will be handled by regional support teams during local business hours and managed by the global support queue outside those hours.

<sup>2</sup> Technical support coverage determined by the product maintenance contract. Premier Support is provided at the customer level covering all One Identity products.

## Support Portal Registration

At the time of purchase, the primary contact designated on the order form is emailed a welcome letter that contains a license number and the company's Account ID number. The license number identifies the asset you purchased, and the Account ID identifies the organization that purchased it.

### These numbers are assigned to your company when a software license and/or maintenance contract is purchased.

Once you have your license number and Account ID number, you will be prompted to register your product for support using the license number or service tag. Once the product is registered, you will be able to manage your asset, download software, access support information and submit cases.

When contacting support or registering your product for support on the Support Portal, you will need to provide either your license number (preferred) or your Account ID.

If you do not know your license number or Account ID, use one of two options to contact a support administrator:

- Call via the numbers listed on the [Contact Support](#) page on our Support Portal.
- Fill out a "Trouble registering on the website" [Customer Service](#) form.

## Customer Service

A Customer Service Administrator is identified as the first person to register the product license number on the Support Portal. A group can have more than one administrator but requires at least one person for the product license number to be registered. The administrator can add or remove support users and license users to the group. A support user can submit case, download new software releases and view asset information. License users can obtain license keys via self-service or by contacting our license assistance administration at [license@oneidentity.com](mailto:license@oneidentity.com).

## Product Support Lifecycle Policy

The Product Support Lifecycle Policy describes the phases during which our products are eligible for patches (fixes), support and downloads from our Support Portal. It is our policy to provide support and fixes on current versions of our products when you are under a current support agreement. Fixes to older versions are at our discretion. We strive to put resources behind the most recent product releases in order to continually improve and enhance the value of our products.

We will attempt to answer questions about older versions of our products provided that resources are available; however, if you are using a discontinued version, you should upgrade to a product version which is in Full Support. Support is here to assist with general upgrade questions, however, should a detailed upgrade plan be necessary, engagement by our Professional Services division may be required.

### Our support policy is to provide support on both the current (n) and prior (n-1) versions of our products.

#### Full support

- Product is fully supported and is the generally available release or version.
- The most current released version of a product and one or more prior releases are included.
- Enhancement requests for this release are accepted and may be considered for future releases.
- Software updates are available and are released at One Identity discretion.
- Release or version is fully supported by both Support and Development.
- Release or version is available for download from our Support Portal.

## Limited support

- Support is available for this release or version, and we will use best efforts to provide known workarounds or fixes.
- No new code fixes will be generated except under extreme circumstances and at our discretion.
- Enhancement requests are not accepted.
- To ensure you are fully supported, customers should upgrade to a product version which is in Full Support. Support is here to assist with general upgrade questions, however, should a detailed upgrade plan be necessary, engagement by our Professional Services division may be required.
- Release or version is available for download from our Support Portal.

## Discontinued

- Includes releases or versions that are retired or discontinued.
- No new patches or fixes will be created for this release.
- Release is not available for download from our Support Portal.
- To ensure you are fully supported, customers should upgrade to a product version which is in Full Support.
- Support is here to assist with general upgrade questions, however, should a detailed upgrade plan be necessary, engagement by our Professional Services division may be required.
- Support is not obligated to provide assistance on this version of the product.

## Case Management Process

- We assign a unique case number to all requests for assistance. These case numbers allow Support to prioritize and track all cases through resolution and allow you to get a status update on your case via our Support Portal.
- All cases are assigned a severity level and are placed in a queue to be processed by the next available support engineer. Support engineers take ownership of your case and see it through to successful resolution.

- The support engineer will contact you, gather any additional information needed and investigate to determine the proper course of action.
- If the support engineer and development team determine that the issue is a Product defect, a defect identifier (ID) and priority level will be assigned to the issue. If the defect is a high priority and a hot fix is planned, the support engineer will notify you of its availability.

## Opening a case

Prior to creating a case, you may want to review these helpful tips:

- Check the online help included with your product.
- Check the product documentation.
- Check release notes and self-service Knowledge Base solutions on our Support Portal.
- Consult your product's community forum, if available (accessible through our Support Portal).
- Try to see if the problem is reproducible.
- Check to see if the problem is isolated to one machine or more.
- Note any recent changes to your system and environment.
- Note the version of your software and environment details, such as OS and database.
- Note the service tag of the appliance or solution (when applicable).
- Note your product license number as we require you to provide your license number on certain products.
- Note the issue description including frequency of occurrence, error messages and any troubleshooting activities
- Collect any relevant screenshots, technical service reports, log files and trace logs (when applicable).

## Contact One Identity Support to Open a Case

You can open a case using the case tool on our Support Portal. You can also place a call to the Support Center in your region using the numbers listed on the [Contact Support](#) page on our Support Portal.

## Case Severity Levels and Response Times

All cases are assigned a severity level from 1 to 4 based on the impact on your business. You determine the initial severity level when placing a request for assistance. Severity levels may be changed after initial contact and assessment of the issue from our support engineer, provided that you are in agreement. The table in Exhibit B defines the severity levels and the targeted initial response time for our support offerings. It is helpful to clearly explain the business impact of your issue when you contact us.

### Closing a case

Cases remain open until you are satisfied that the issue has been resolved. Exceptions to this policy apply to requests for product enhancements and product defects.

You also can close cases via the My Cases section of our Support Portal.

### Reopening a case

You can reopen cases that have been closed within 30 days of the close date. If you attempt to reopen a closed case after 30 days, a new case will be created with a link to the original case. You have the ability to reopen your closed cases from the My Cases section of our Support Portal.

### Escalation guidelines

Our goal is to resolve all cases in a satisfactory and timely manner; however, we realize that some situations may require increased attention and focus within the support team. You can raise the severity of a case through the online Case tool on our Support Portal, or call us and request to speak with a Support Manager.

Upon your request, the Support Manager will evaluate the case and create an action plan. If you are not satisfied with the plan or with the progress of the case after the plan has been implemented, you can contact the director of One Identity support, who will review the case with the Support Manager and determine if different or additional actions are required.

## Product Enhancements

If you are interested in submitting a product enhancement request, you can do so by creating a support case. Once fully documented, the request will be submitted into the enhancement review system and an identification number will be provided to you. Your case will then be closed.

Product management will review the open enhancement requests on a periodic basis and consider them for inclusion in a future product release. Product enhancements will not be considered or implemented in current or prior product releases. There is no guarantee that a specific enhancement request will be implemented in a future version of our products.

At our discretion, we may determine that certain enhancements to functionality in the product can be offered for an additional charge or as a chargeable option. All new enhancements implemented can be found by reviewing the release notes of the product in question.

## Product Defects

If your issue is determined to be a defect in our software, it is recorded in our defect tracking system, a unique defect ID will be provided and your case will be closed. If the defect is deemed to be critical in nature your case will remain open until a decision has been made regarding the defect.

Notifications of new product releases are emailed to you if you have configured your profile on our Support Portal to receive product notifications. Release notes for new releases of products will contain a list of Resolved Issues that were addressed in the release. You can review the release notes on our Support Portal using your defect ID to see if the issue has been addressed. Release notes can be searched via product documentation on our Support Portal. We do not guarantee that all defects identified will be fixed in a future release of the product.

Severity Level	Description	Initial Response Standard Support	Initial Response 24x7 Support	Initial Response Premier Support
<b>Level 1</b>	<p><b>Critical business impact</b></p> <p>Customer's production use of our products on a primary business service, major application or mission - critical system is stopped or so severely impacted that the customer cannot reasonably continue work.</p> <p>For severity Level 1 problems, we will begin work on the problem within one hour of notification and handle the issue as the highest priority until the customer is given a fix or workaround. Customer resources must be made available in severity Level 1 situations and reasonably cooperate to help resolve the issue. Severity Level 1 problems could have the following characteristics:</p> <ul style="list-style-type: none"> <li>• System hangs or crash situations</li> <li>• Data loss or data corruption</li> <li>• Critical functionality not available</li> </ul> <p>Severity Level 1 issues must be reported via telephone</p>	<b>Within 1 hour</b>	<b>Within 1 hour</b>	<b>Within 30 minutes</b>

**Note: Severity Level 1 case cannot be logged through our Support Portal; call us to log a severity Level 1 case.**

<b>Level 2</b>	<p><b>Significant business impact</b></p> <p>Important product features are unavailable with no acceptable work-around. Customer's implementation or production use of our products in a primary business service, major applications or mission-critical systems are functioning with limited capabilities or are unstable with periodic interruptions. The software may be operating but is severely restricted. Severity Level 2 problems could have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Product error or failure forcing a restart or recovery</li> <li>• Severely degraded performance</li> <li>• Functionality is unavailable, but the system is able to operate in a restricted fashion</li> </ul>	<b>Within 2 hours</b>	<b>Within 2 hours</b>	<b>Within 1 hour</b>
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<b>Level 3</b>	<p><b>Minimal business impact</b></p> <p>Product features are unavailable, but a workaround exists and the majority of software functions are still usable. Minor function or feature failure that the customer can easily circumvent or avoid. Customer's work has minor loss or operations functionality. Severity Level 3 problems could have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Error message with workaround</li> <li>• Minimal performance degradation</li> <li>• Incorrect product behavior with minor impact</li> <li>• General questions relating to standard product functionality</li> </ul>	<b>Within 4 hours</b>	<b>Within 4 hours</b>	<b>Within 2 hours</b>
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**Level 3 is the default severity level setting.**

<b>Level 4</b>	<p><b>Nominal business impact</b></p> <p>A minor problem or question that does not affect the software function. For example, a request for information on how to use a particular feature, a general question or requests for documentation or enhancements. Severity Level 4 problems could have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Clarification on product documentation or release notes</li> <li>• Product enhancement request</li> </ul>	<b>Within 1 business day</b>	<b>Within 1 business day</b>	<b>Within 4 hours</b>
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<sup>1</sup> Available during local business hours.

<sup>2</sup> 24x7 coverage for severity Level 1 issues.

## Product Licensing

Our products have license keys generated for your use. Some products require a new license key when upgrading our software to a new release or patch. We also recommend that prior to any migration or upgrade of our products, new licenses are confirmed as functioning properly because some license keys are machine and machine name specific.

If you have questions about licensing of a product, complete the form available on our Support Portal Licensing Assistance Page. A licensing representative will respond to your query within 24 hours.

## Support for Trial Users

We offer software trials on selected products for evaluation purposes. Support for trial software is limited to 30 days from the registration date. Cases for your trial product may only be submitted during the first 30 days of your testing period.

## Consulting Services

There may be times when additional resources are required to solve your case. We can work with One Identity Services to ensure a reliable hand off of your issue. One Identity Support handles break/fix issues as they arise with our products including issues that arise once software is installed and configured, software that is not working as expected or Product Defects or Enhancements.

Support does not assist with installation and configuration of our products, performing upgrades, performance tuning, walkthroughs or issues related to customizations. Customers are responsible to perform database maintenance along with ensuring data consistency. Our Professional Services team should be engaged for requests to perform in-depth deployment reviews, architecture concerns, upgrade plans or configuration related queries. Should product training be required customers may review our course offerings within [One Identity University](#). If additional training is required please reach out to your Account Manager who can offer customized training for your organization.

## One Identity Services for our solutions

One Identity adoption services ensure your IT staff is effectively using your solution to its fullest potential. One Identity deployment services help you quickly

install and configure your product properly. One Identity software-enabled services combine the strengths of our proprietary software, tools and domain expertise to reduce complexity, demands on your IT staff and costs.

### One Identity Services help you:

- Experience faster time to value
- Get a customized solution to meet your unique business needs
- Quickly and properly deploy your solution
- Reduce risk and uncertainty
- Overcome internal resource constraints

Visit [One Identity Services](#).

## Educational Services

Our Training and Certification team provides the necessary expertise to help you get the most out of your software purchase, appliance or cloud service. Our certified instructors bring years of industry experience and in-depth product knowledge to every class they teach. Who better to teach your employees about our products than the experts who know the applications and the underlying technology best? Whether you need us to facilitate private group training on-site or online, or you want to attend a public course provided at a training facility or through a Virtual Classroom, we have the program to meet your needs. By the end of class, your staff will know best practices, tips and tricks and how to optimize functionality, as well as have an understanding about how the product impacts your business. Visit [Educational Services](#).

Severity levels provide insight to the business impact of the issue you are reporting. A lower severity level does not mean that we devote less time or energy to resolving your problem quickly and efficiently.

## Support for Operating Systems

One Identity performs quality control testing against fully supported Operating Systems for performance and security purposes. If a third party vendor ceases development or support for an Operating System or version of that Operating System, One Identity will cease support of the One Identity product that is designed to interact with or be installed on such Operating System as well. Customer will not be entitled to any refund, credit or other compensation as a result of the discontinuation.

## Support Policy Customizations

A customization indicates functionality and configurations added to a One Identity product that are not provided as part of the core product release and, as such, would be outside the scope of normal support and maintenance. Customizations can include new or modified scripts used within or alongside our products as well as additional functionality, such as custom reports, dashboards, rules and automated actions, developed by you, your partners or our services organization.

### Product Preview Features – Support Policy

At our discretion One Identity may provide customers with previews of planned functionality in the form of “Preview Features” within a particular product version release. These features provide customers with an insight into product direction and plans for enhanced functionality. All preview features are clearly referenced within the product documentation. All shared Preview Features have completed QA release testing. However, customers must consider these shared Preview Features as a work-in-progress as they may not represent the final design. For this reason, customers should note the following limitations with regards to Preview Features of which we are keen to receive feedback.

#### The Support team will:

- Accept and review each case opened regarding a Preview Feature
- Consider all cases relating to a Preview Features as severity level 3
- Provide best effort support to resolve any issues relating to a Preview Feature
- Work with customers to log any product defects or enhancements relating to Preview Features
- Not accept requests for escalations regarding Preview Features
- Not provide after-hours support for Preview Features

Additionally, please note that after a change request is provided the **case will be closed.**

## Support and customizations

Technical support does not perform or maintain customizations. The design and development of customizations to our products is your responsibility. Assistance from support will be limited to helping ensure that the product’s functionality, which enables the addition of customizations, is functioning as expected. Alternatively, you may obtain guidance through product specific support sites or the Support Knowledge Base available on the Support Portal.

### Advanced assistance

If more thorough and detailed assistance is needed to design and develop customizations, we recommend that you engage our One Identity Services organization or fully certified partners to assist. Their expertise in designing customized solutions will ensure that you receive maximum value and product adoption. In addition to providing post-implementation expert services, One Identity Services also offers a variety of prepackaged customizations for products that may meet your specific requirements.

We also recommend that you obtain appropriate product training before attempting to design, develop and implement any customization to our products. Our training courses will equip you with the necessary knowledge and ability to design and implement effective changes to our products. For more details on the training services available, refer to the One Identity Educational Services section.

### Maintaining customizations

Careful consideration should be given to all customizations during future migration or upgrade exercises to new product or platform versions. Customizations could inhibit the upgrade itself and may require a level of rework to continue functioning properly. Support does not take ownership for any customizations. We strongly encourage you to document and maintain records on any implemented customization work. These records can be useful in determining whether problems are caused by customization or are a defect in the core product.

For assistance with maintaining and updating customizations **please contact [One Identity Services](#).**

## Support Policy on Virtualization

Virtualization is a technique for hiding the physical characteristics of computing resources from the way in which other systems, applications or end users interact with those resources. It is able to make a single physical resource, such as a server, operating system, application or storage device, appear to function as multiple logical devices. It can also make multiple physical resources, such as storage devices or servers, appear as a single logical resource. As a result, virtualization enables IT departments to increase the utilization of resources, increase high availability, and simplify back-up, systems administration and recovery procedures. It also allows IT departments to be more responsive to the dynamic needs of the business. Examples of virtualization technologies include VMware ESX Server, Citrix/XenServer and Microsoft Hyper-V.

**Our products leverage the binary compatibility offered through virtualization technologies, which provide complete transparency to the operating systems and applications deployed.**

As a result, for all casework received where the One Identity product is being used in a virtual environment, we will assume that the problem is common to both native and virtual operating environments, and that we will only require the customer to recreate the problem in a native environment if and when there is reason to believe that the problem is unique to the virtual environment itself.

From a purely functional perspective, our products will operate in exactly the same way, however we can make no guarantees with respect to performance or scalability in a virtualization environment. Configuration aspects, such as CPU, memory availability, I/O subsystem and network infrastructure, can all influence a deployment. Because of this, careful consideration should be given to ensure the virtual layer has the necessary resources available to provide a satisfactory

user experience. When attempting to resolve performance issues with One Identity products, support may request that our products be installed directly upon physical hardware in an attempt to eliminate the virtualization layer from being the cause.

## Support Policy on Collaborative Assistance

We are committed to providing products that work on the latest platforms and technologies available in the industry today. We work closely with technology vendors to ensure the earliest possible compatibility with our solutions. We provide full details of all systems requirements, together with platform and third-party product versions supported on our products, in the release notes published for each product. These include operating system versions, service-pack levels, mail clients or server versions, database versions, browsers and other related technology supported, as well as which particular version level our products have been formally tested and certified to run against. The support of future platform versions, new service packs and other related technologies is generally taken into consideration and addressed during the regular product maintenance and release cycles of our products. This provides ongoing upward compatibility of our products. It should be noted that there could be a delay between the availability of the latest platform technology release or service patch and the product version certified to operate against this.

**Contact One Identity Support if you have questions regarding the current support status of any product and a particular related platform, patch or third-party product support not explicitly documented in our release notes, and we will provide collaborative assistance with the product in question.**

For more information about the latest third-party platforms and versions supported, review the system requirements section of the release notes for your product or search the Knowledge Base on our Support Portal. Please note that while we do not directly or officially support third-party software, we work closely with many other providers to ensure that you receive the best possible service at all times.

### **Getting Assistance with One Identity Open Source GitHub Content**

For assistance with any One Identity GitHub project including scripts, plugins, SDKs, modules, code snippets or other solutions, please raise a new Issue on the One Identity GitHub project page. You may also visit the One Identity Community to ask questions. Requests for assistance made through official One Identity Support will be referred back to GitHub and the One Identity Community forums where those requests can benefit all users.

### **Renewing your support**

The One Identity Renewals team can assist you with questions regarding your support maintenance contract or upgrading to another support offering.

For more information, including support options, contact information and frequently asked questions, visit our [support renewal page](#) on our Support Portal.

### **Upgrading your Support Program**

Our goal is to meet your specific business requirements. As your business needs change, we may have the flexibility to modify your Support Program to better align with those needs. If you would like to discuss your support contract, contact your support renewal representative.

### **Renewing support**

A One Identity renewal representative will send you a renewal notice prior to the end of your current support contract. To avoid unnecessary interruptions of support services, contact the One Identity Renewal team if you have any questions about the status of your current support contract or pending renewal.

### **Lapsed support**

Without a current support contract, you will not be able to contact One Identity for technical assistance or access many services on our Support Portal like the Knowledge Base or chat functionality. We cannot guarantee assistance if you allow your support contract to lapse or if you choose not to purchase support until after a support issue arises.

### **Contacting Support**

Our [Support Portal](#) is your primary source of information as it provides you with the ability to quickly and efficiently find answers to your most common questions.

If you are unable to find the information or perform the actions you need on our Support Portal, call the Support Center for your region using the numbers listed on the [Contact Support](#) page on our Support Portal.