

# OpenText Core Fax

## Support Handbook\*

\*Including OpenText XM SendSecure cloud

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# 1 Introduction

Welcome to Technical Support for the OpenText™ Core Fax (formerly XM Fax cloud) and OpenText XM SendSecure solutions.

The purpose of this handbook is to provide guidelines and reference information that you will need when requiring support from OpenText. Specifically, our goal is to provide an overview of support and to help you use support effectively.

Please review this handbook carefully. It contains important information regarding your OpenText support.

## 1.1 Support Pledge

OpenText's pledge is to use our years of experience in the industry to deliver services for your benefit. The people in our Technical Support Center are dedicated, experienced, and skilled professionals who aim to ensure your satisfaction each time you call or email us for support. They are eager to help you in all facets of support whether it be solving your problems or answering your questions. Their goal is to ensure you operate productively and effectively to maximize your investment in our messaging services.

## 1.2 Support Overview

Our support is intended to supplement your skills in the use and operation of our services. As such, you have access to support professionals for help with services specific operational issues. From our Technical Support Center, you receive the following:

- Online ticket submission via [MySupport](#) portal (self-help)
- Phone support
- Account administration
- Message tracking
- Notification of system outages
- Training on service and self-help tools
- Problem analysis and resolution

Our Technical Support Center comprises a team of individuals who work together to provide dependable and timely resolution to your inquiries. For complex problems, our team has access to the experts in our Development, IT Operations and Management teams. Therefore, you have access to the right level of our expertise when you need it.

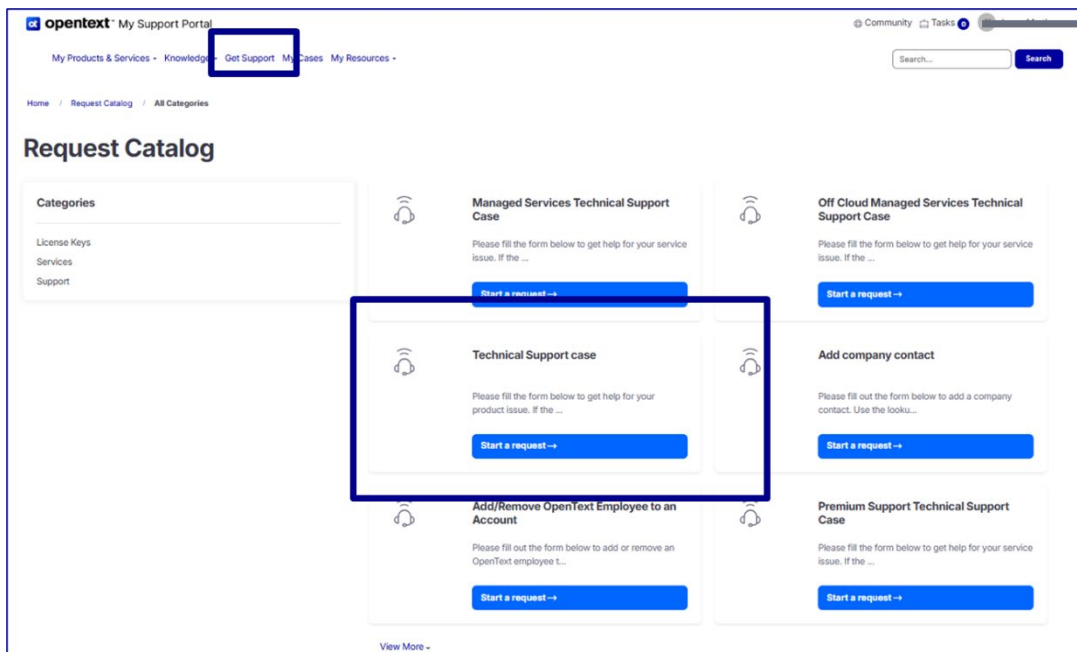
## 2 Maximizing Your Support Interaction

Your technical contacts should be knowledgeable of your operating environment in order to help resolve issues. As such, they have an in-depth understanding of the mail service and are comfortable with application usage enabling them to support your business processing.

### 2.1 How to Report a problem for Core Fax or XM SendSecure

To report a problem, initiate a ticket in **MySupport** portal.

1. **Log in to <https://support.opentext.com>** (credentials required).
2. In top menu, select **Get Support**
3. The various Support options appears
4. From the **Technical Support case** section, select **Start a request**
5. Fill-in the form on the **Technical Support case** page
  - **Account** name field is auto-filled based on your profile
  - *Digital Fax and Document delivery* should be selected in the **Product lines** field (for XM Fax or XM SendSecure)
6. Click Submit when all fields are filled in



You will receive a response notification from OpenText Support confirming receipt of your service request.

Be sure to include the following information as appropriate when you contact us:

- Date and time the event occurred, or data was sent, as accurately as possible
- Define the problem: Be as specific as possible by providing details and clearly articulating the problem
- Gather information: Error messages, notifications, alerts, etc. serve as vital information in the problem-solving process.

Please take the necessary steps documented above. These steps are critical to solving problems, answering questions, and addressing issues quickly. Preparing for contact with support will help ensure that the support specialist has the information required to troubleshoot the issue.

If you do not have an account in MySupport, please refer to the attached MySupport FAQ document in Appendix B.

## 2.2 How to Reach a Support Representative

OpenText Support agents can be contacted through our support hotline. Please reference the contact numbers provided in Appendix A. It is critical that your call be directed to the number within your region, not to an individual's phone number or extension. Directing your call to the correct number ensures that your request for assistance will be handled promptly and in accordance with our policies and practices.

You will receive a reference number for each call to support, which can be used for all subsequent follow up on the issue. Using your reference number will help support track your issue quickly.

## 2.3 How the Support Submission is Acknowledged and Assigned

You will receive a response notification from OpenText Support confirming receipt of your service request. You will then be assisted by a support specialist who will make every effort to respond to your request per the guidelines below. Our initial response to your inquiry might resolve your request for support or it might form the basis for a more in-depth investigation. If more in-depth expertise is required, your support specialist will escalate the issue to the department or team member having the required expertise.

## 2.4 How Support Prioritizes Issues Based on the Priority/Severity Level

OpenText Support is an ITIL-based support organization (Information Technology Infrastructure Library is a set of practices and a framework for IT activities). Support request severity is determined based on the request impact and urgency. Support agents analyze the reported issue, then will assign a severity level based on the information provided. This severity level helps drive the prioritization of issues in our Support organization. As such, severity levels are applied with great care, so that support specialists are properly addressing the most severe cases.

*Please note that all email requests are categorized as general support inquiries, and by default set to a lower priority.*

Severity Level	Definition	Initial Response/Escalation	Target Resolution
1	Application and/or infrastructure services are impacted with no workaround	< 30 minutes	< 2 hours
2	Application and/or infrastructure services are experiencing a significant impact	< 1 hour	< 3 hours
3	Application and/or infrastructure services are degraded or resolved to workaround	< 2 hours	< 12 hours
4	General inquiry or service request	< 24 hours	< 3 business days

*Table 1. Severity levels and service-level objectives*

## 2.5 How Support Responds to Technical Questions

Support specialists are available to research and respond to your issues and questions. They may provide assistance by discussing the issue with you, referring you to the appropriate documentation, or helping you access the self-service section of MySupport (<https://www.opentext.com/support>)

## 2.6 How to Escalate an Issue

Our emphasis on achieving superior support cannot be overstated. You may request an escalation at any time. If you believe we are not honoring our policies and practices or meeting our commitments, you may ask to speak with the manager. You may also escalate your issue to the contacts provided in Appendix A.

If the manager determines that the support staff is not following policies and practices or failing to provide adequate support, the manager will ensure that the issue receives prompt attention and proper focus.

## 3 Optimizing your Internal Efficiency

To boost your staff productivity and effectiveness with our services and the Customer Portal, you need to ensure your staff has the skills and training to operate the services within your environment. The following section outlines responsibilities that will help you plan for and assign your staff's daily tasks and projects.

### 3.1 Third-Party Software

Third-party software that interacts with our services is not considered part of our offering. Thus, we do not have the in-depth technical skill to diagnose third party software problems. We will refer you to those third-party software vendors for technical support when we diagnose the problem is not with our service.

### 3.2 IT Infrastructure

It is your responsibility to configure, monitor and maintain an IT infrastructure (computer, operating system, communications network and software, printers, integration into backend systems, etc.) that enables connectivity. An IT infrastructure is not considered part of our service offering; therefore, we do not have in-depth technical skill to diagnose IT infrastructure problems. When we diagnose the problem to be specific to your IT infrastructure, we will refer you to vendors or your IT staff for technical support. We can assist you with troubleshooting of some configuration issues by providing logs and network traces.



## 4 Incident Management

### 4.1 Incident Management Overview

To maintain security and support mission critical processes for customers, OpenText is focused on ensuring all risk is minimized. Thus, we employ a well-defined and proven Incident Management Process that is invoked immediately when an incident causes a breach in security or a service disruption impacting multiple customers.

### 4.2 Incident Management Process

The Incident Management Process includes two teams:

- Customer Notification Team
- Incident Investigation & Resolution Team

The Customer Notification Team will assess the affected customers after a problem is encountered. A written notification is delivered to impacted customers within twenty to thirty minutes after the impact is determined.

The Incident Investigation & Resolution Team performs the following functions:

- Assess scope of problem
- Assemble subject matter experts
- Establish plan for problem resolution
- Execute plan for problem resolution

The Customer Notification Team and the Incident Investigation & Resolution Team work simultaneously to ensure that customers are provided with periodic status updates and that the problem is resolved as quickly as possible. Upon resolution, the Post Mortem Team is engaged.

During the incident, the focus is on problem solving. Problem solving is not the same as root cause analysis. Thus, at the conclusion of an incident, we facilitate a Major Problem Review. This review involves all incident participants to assess the successes and failures of the way in which the incident was handled, identify root causes for failures and create an action plan to mitigate risks for a reoccurrence in the future.

Failure to perform a thorough analysis result in an action plan that has little to no value. As a result, we focus on performing analysis work correctly the first time. Thus, adequate time is allocated to finding the specific source(s) that created the problem. It is only through identification of the source(s) that effective action(s) can be taken to prevent recurrence of the situation.

### 4.3 RCA Report

Upon completion of the Major Problem Review, a Root Cause Analysis (RCA) Report is created to provide an overview of the incident and a summary of the required actions to mitigate risks for reoccurrence. A copy of the RCA Report is available upon request.

## Appendix A: Escalation Contacts

Support contacts – The contacts provided should be called in the order listed, starting with Technical Support.

Title	Contact Number	Email Address
Customer Service	North America: 1 800 540 7292 International: +1 519 888 9933 Europe: +49 89 4629 2121	
Roderick Welch Manager, Production Support	+1 520 784 5220 +1 520 275 5460	<a href="mailto:rwelch@opentext.com">rwelch@opentext.com</a>
Sariah Kruger Director, Business Network Support	+1 520 784 5210 +1 520 270-0861	<a href="mailto:skruger@opentext.com">skruger@opentext.com</a>

## Appendix B: MySupport FAQ

Please refer to attached document for MySupport online portal Frequently Asked Questions FAQ



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## About OpenText

OpenText enables the digital world, creating a better way for organizations to work with information, on-premises or in the cloud. For more information about OpenText (NASDAQ/TSX: OTEX), visit [opentext.com](https://opentext.com).

Connect with us:

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