



Latitude by Genesys Support Handbook

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Abstract

This document describes the Latitude by Genesys Support policies and serves as a guide for Latitude by Genesys Support and Latitude by Genesys customers. Latitude by Genesys Support revises this handbook periodically as we improve our processes and respond to customer needs. For the latest version of this document, see the Product Information site at:

<https://my.inin.com/products/pages/default.aspx>.

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Table of Contents

Purpose of This Handbook.....	4
General Information	4
Mission Statement.....	4
Philosophy.....	4
Feedback.....	4
Reference information.....	4
Service Levels	5
Code Red.....	5
Priority 1 condition	5
Key deliverables	5
Target response objective.....	5
Examples	5
High Priority	6
Priority 2 conditions.....	6
Key deliverables	6
Target response objective.....	6
Medium Priority.....	7
Priority 3 conditions.....	7
Key deliverables	7
Target response objective.....	7
Low Priority	7
Priority 4 conditions.....	7
Key deliverables	7
Target response objective.....	8
Issue Reporting	8
Create a support case	8
Call Latitude by Genesys Support	8
Hours of operation.....	8
After-hours emergency.....	8
Management assistance	9

Issue Management.....	9
Preparation work	9
Issue tracking	9
Issue resolution.....	9
Remote access	10
Issue states and statuses	10
What We Support	11
Supported products	11
End of life products.....	11
Customizations.....	11
Customer Expectations	11
Proactive system maintenance	11
Professionalism.....	11
Customers must provide level one support.....	12
Use of a development or test environment	12
Copyright and Trademark Information	13

Purpose of This Handbook

The Latitude by Genesys Support Handbook sets the expectations between our customers and Latitude by Genesys Support. Its purpose is to acquaint new customers with support policies, and serve as a guide on how our customers and Latitude by Genesys Support work together. This document contains information such as the Latitude by Genesys Support incident escalation processes, incident classification data, and contact information.

This document defines the criteria that our customers can use to set their expectations in terms of the support received from Latitude by Genesys Support.

General Information

Mission Statement

To provide our Latitude by Genesys customers with world class support by providing the information, tools, assistance, and mentoring necessary to enable their success.

Philosophy

Latitude by Genesys Support is dedicated to enabling our customers to succeed. We are here to assist you so that you can successfully implement and support your organization on an ongoing basis.

Our common goal is to create an environment that is as successful as possible. Together, we can ensure the prevention of potential issues and the quick resolution of those issues we cannot prevent. We can continue to enable our customers to succeed by deploying the most exciting ARM solution available in the market today.

Feedback

Your opinion is important to us. We invite your input at any time to help us improve as a support organization. You can send feedback to Support.customercare@Genesys.com. Latitude by Genesys also surveys our customers regarding their interactions with our support team. The survey is available by a link in the closed incident notification. With your input, we can continue to develop a support organization designed to meet your needs and enable you to succeed.

Reference information

The Latitude by Genesys Support website provides access to product documentation, support information, and vendor interfaces. For more information, open <https://genesyspartner.force.com/customercare/GenesysCommunityLogin> and then click the “Documentation” category. It contains the following sections:

- **Product Documentation** – This section organizes official release information, documentation, system prerequisites, updates, and recommendations for each Latitude by Genesys product.
- **Support** – This section provides a document detailing our instructions for viewing and submitting support incidents.
- **Vendor Interfaces** – This section provides documentation on customer interfaces, Fusion Wizard help, and Credit Bureau Reporting.

Service Levels

Latitude by Genesys Support has four levels of support: code red, high priority, medium priority, and low priority. This section describes the service levels and their conditions, key deliverables, and target response objective.

Code Red

The Code Red service level is a Priority 1 and indicates critical business impact. The program is not usable, resulting in a critical impact on production operations. No workaround is available. This condition requires immediate resolution.

Priority 1 condition

The issue has crippling effect on the customer's business.

Key deliverables

Priority 1 support involves reacting to the customer's emergency situations by assigning a suitable resource immediately. Latitude by Genesys Support Services Priority 1 incidents, unless otherwise agreed upon with the customer, on a continual effort basis until resolution of the Priority 1 condition. Resolution to a Priority 1 condition can occur in various forms, including temporary relief that is viable in enabling the customer's business to operate until Latitude by Genesys Support provides a more comprehensive solution.

Priority 1 help delivery requirements

- Both the product and the customer are eligible for support assistance.
- Customer is available 24x7 to collaborate actively with the Support Desk Engineer.
- System access or system information is available 24x7.

Target response objective

During the hours of 8:00 am to 7:00 pm EST Monday through Friday, initial response by way of the Latitude by Genesys Support line is 70 percent of calls answered within 15 minutes or less. Because of the nature and severity of Priority 1 incidents, if the customer uses self-help (email / portal), we don't guarantee initial target response times. Therefore, customers must communicate all Critical incidents using the Latitude by Genesys Support line during normal business hours*. Ongoing responses are continuous (every 30 minutes) until the incident case lowers to a Priority 2 or resolved. Unless otherwise agreed, a break in continual effort by the customer results in the situation no longer being classified as critical (with a corresponding lowering of priority).

Ongoing response must be continuous until the case lowers to a Priority 2 condition or resolves.

Examples

- SQL Server instance in production is down, affecting underlying business operability.
- Third-party Dialer not functioning.
- Custodian stopped running or error.
- Customer cannot process payments (import/export processes and payment entry).
- Application timeouts impacting all users
- Customer cannot invoice or remit.

- End of day – can't queue or schedule accounts.
- A database/application Customer has repeated production outages that are disrupting the success of their business.

High Priority

The High Priority service level is a Priority 2 and indicates significant business impact. The program is usable but severely limited, resulting in a serious impact on production operations. No workaround is available. This condition requires immediate resolution.

Priority 2 conditions

- Critical application returning error.
- Poor performance having serious negative impact on business.
- A database/application error has occurred, severely hampering business operability.
- Time sensitive business processes (loading, creating, and exploration of data files).
- Unable to load new business.
- Letter processing is not functioning.

Key deliverables

Latitude by Genesys Support Services Priority 2 issues as critical during normal non-outbound only business hours* unless an alternative customer agreement exists and until the Priority 2 condition resolves. Latitude by Genesys provides rapid resolution using best effort.

Priority 2 help delivery requirements

- Both the product and the customer are eligible for customer support assistance.
- Customer, unless otherwise agreed to, is available during normal business hours*.
- System access or system information is, unless otherwise agreed to, available during normal business hours*.

Target response objective

During the hours of 8:00 am to 7:00 pm EST Monday through Friday, initial response by way of the Latitude by Genesys Support line is 80 percent of calls answered within 30 minutes or less. Because of the nature and severity of Priority 2 incidents, if the customer uses self-help (email / portal) for Priority 2 incidents, we don't guarantee initial target response times. Therefore, customer must communicate all High incidents using the Latitude by Genesys Support line or management email during normal business hours*. Ongoing responses are continuous (every 1 hour) until incident case lowers to a Priority 3 or resolves. Unless otherwise agreed, a break in continual effort by the customer results in the situation no longer being classified as high (with a corresponding lowering of priority).

Medium Priority

The Medium Priority service level is a Priority 3 and indicates some business impact. The program is usable with less significant features (not critical to operations) unavailable or a suitable workaround exists.

Priority 3 conditions

- Issue affects the customer's ability to meet near term deadlines.
- Workstation installation issues.
- Non-critical applications returning errors.
- Poor performance having negative impact.
- Acceptable workarounds may exist.

Key deliverables

Latitude by Genesys Support Services Priority 3 incidents as having medium importance to both the customer and customer Services. Such issues progress during normal business hours* until the Priority 3 condition resolves.

Priority 3 help delivery requirements

Both the product and the customer are eligible for customer support assistance.

Target response objective

During normal business hours*, Latitude by Genesys Support must respond initially within 12 hours of receiving a Priority 3 incident. Ongoing response updates are every 72 hours until the incident resolves. Unless otherwise agreed, a break in continual effort by the customer results in the situation no longer being classified as medium (with a corresponding lowering of priority).

Low Priority

The Low Priority service level is a Priority 4 and indicates minimal business impact. The issue has little impact on operations or the customer implemented a reasonable circumvention to the issue.

Priority 4 conditions

- General question such as "how-to".
- Issue with little or no impact.
- Documentation issues.
- Software feature requests.
- Issue is resolved but remains open for customer confirmation. Intermittent wait status with little or no customer interaction required.

Key deliverables

Latitude by Genesys Support Services Priority 4 incidents as general issues during normal business hours* until the Priority 4 condition resolves. Priority 4 service delivery requires eligibility of both the product and the customer for customer support assistance.

Target response objective

During normal business hours*, Latitude by Genesys Support must respond initially within 16 hours of receiving a Priority 4 incident. Ongoing response updates are every 72 hours until the incident resolves. Unless otherwise agreed, a break in continual effort by the customer results in case closure.

Issue Reporting

Create a support case

Latitude by Genesys Support prefers that you report issues using the online issue tracking system at <https://genesyspartner.force.com/customercare/GenesysCommunityLogin> . Therefore, we ask that you create a case before calling Latitude by Genesys Support.

Note: If you do not have access to the online issue tracking system, contact Genesys Customer Care at customercare@genesys.com.

Important!

A code red situation is an exception to creating a case before calling. Call our support line toll free at **1-866-396-2599, Option 5** and indicate it is a code red. Also email support management at SupportLatitudeManagement@genesys.com.

Call Latitude by Genesys Support

When calling Latitude by Genesys Support at **1-866-396-2599**, use your personalized PIN when the IVR prompts you. Your PIN helps us to identify you and your company.

Note: If you do not know your PIN, contact Genesys Customer Care at customercare@genesys.com.

Hours of operation

Latitude by Genesys Support is available from **8:00 am to 7:00 pm EST, Monday through Friday**. During non-business hours, emergency support is also available through our on-call engineer.

After-hours emergency

Support and maintenance provided after standard support hours are for emergency support issues only. In an after-hours emergency, call Latitude by Genesys Support at **1-866-396-2599** and select **Option 2**.

Emergency support issues include:

- SQL Server instance in production is down, affecting underlying business operability.
- Third-party Dialer not functioning.
- Custodian stopped running or generated an error.
- Customer cannot process payments (issues with import, export, and payment entry).
- Application timeouts impacting all users.
- Customer cannot invoice or remit.
- End of day – can't queue or schedule accounts.
- A database or application customer has repeated production outages that are disrupting the success of their business.

Important!

Do not email or call a specific individual because the individual may be out of the office or away from their desk for an extended period. Call Latitude by Genesys Support through the IVR and use the appropriate routing to connect to an engineer.

Management assistance

If you have an issue that requires management assistance, ensure that you created a support incident for use as a point of reference. Also, specify the priority and impact in the Support Incident. We cannot address the escalation until you report it properly to Latitude by Genesys Support.

For management assistance, send an email message to SupportLatitudeManagement@genesys.com.

Issue Management

Preparation work

Understand your environment and understand the issue. It's not easy to know what questions to ask or how to interpret given information--this skill comes with experience. Following are some examples of questions you should prepare to answer before reporting your issue to Latitude by Genesys Support.

- What specifically is happening or is not happening?
- How do you feel the behavior should be different?
- Under what circumstances does the behavior manifest?
- Does it work some of the time, all of the time, or none of the time?
- Does it work for many people but not everyone? Is it only malfunctioning for one person? Does it only happen when using certain parts of the software? If you swap equipment and users, what happens to the issue?
- Can we get a full account of all recent changes?
- These changes can include any changes to the server hardware or software, the network, customizations, the carrier, or the IT infrastructure. For example, domain controller, DNS server, DHCP server, email server, or DB server.
- Was the system under excessive load at the time of the occurrence?
- Ensure that Performance Monitoring is always in place.
- If you have an error, provide a screenshot when submitting your support issue.

Issue tracking

Our online issue tracking system is Salesforce or Service Cloud. You can access the system at <https://genesyspartner.force.com/customercare/GenesysCommunityLogin>.

You can report issues directly in the Salesforce or Service Cloud web client. This progress and the progress of all other cases assigned to your engineers are available using Salesforce or Service Cloud.

Issue resolution

An exchange of phone calls and work notes occurs to accomplish the following:

1. Establish an understanding of the issue.

2. Determine what troubleshooting steps to take to narrow down the problem area.
3. Determine which logs or information to gather to find out why the system is behaving in a certain way.
4. Establish the need for education, configuration change, enhancement request, bug report, fix, workaround, or other resolution if possible.

Notes:

- Unless otherwise agreed upon (such as with Latitude in the Cloud customers), it is the customer's responsibility to complete all information gathering, troubleshooting tests, log and configuration gathering, configuration changes, and to fix applications. If we are unable to progress on the issue because of lack of contact or lack of cooperation, we flag the case (at least temporarily) as "Resolved".
- Latitude by Genesys Support reports established defects or bugs to Development in the form of a Systems Change Request (SCR). Development may or may not fix the defect in a subsequent release. While Latitude by Genesys Support is not in control of what gets fixed and when, we may request the release of an untested Engineering Special (ES) in the event of severe system instability.

Remote access

For faster troubleshooting, Latitude by Genesys Support can employ remote control technology where appropriate. Customers can choose to allow Latitude by Genesys Support limited, remote control access into their system. The customer must provide and maintain this access. This process can speed up retrieval of logs and other information after turning on tracing. Latitude by Genesys Support understands and respects the Customer's right to maintain the security of their system, and uses this technology only in pre-approved circumstances.

Note: The use of remote control technology does not remove the customer's responsibility to help gather necessary data. Without remote access, our ability to troubleshoot your system is limited to the technical level of the people you have on staff.

Issue states and statuses

An issue goes through three states: Open, Resolved, and Closed. Open is the initial state. We move incidents upon resolution from Open to Resolved. After 45 days from resolution, the incident moves automatically to a closed state.

The statuses available for open incidents are numerous. Following is a breakdown of the most important ones:

- **Waiting Feedback from Customer:** We are actively waiting for you. This status is the most important one of which to be aware. We continue to push for updates.
- **Monitoring:** Waiting for you.
- **Researching:** Waiting for us.
- **Waiting Engineer:** Waiting for us.
- **Waiting Internal Contributor:** Waiting for us.
- **Waiting Third Party:** Waiting for us.

- **Reported:** Waiting for us.
- **Escalating:** Waiting for us.

What We Support

Supported products

Latitude by Genesys provides support for Latitude by Genesys products only. If your organization purchased products from another vendor, contact that vendor directly for support on those products. We concurrently assist you and your vendor with isolating the issue with third-party products, provided the issue appears to be related to Latitude by Genesys products and provided you are actively working with the vendor to troubleshoot.

End of life products

For information regarding end of life or end of support for Latitude by Genesys products, contact the Latitude by Genesys Support at 1-866-396-2599, option 5 during normal business hours.

Customizations

Latitude by Genesys Support does not provide support for customizations. Genesys' Professional Services Organization handles these types of projects and they could be billable.

Customer Expectations

Proactive system maintenance

Proactive steps can reduce system issues and ensure that changes your organization makes are tested fully and are more likely to be successful. For Premises based customers, we recommend that you have your internal technical teams complete normal server maintenance including periodic rebooting. Also, have reliable database maintenance jobs (indexing, re-indexing, defragmentation) to assist with performance and scalability on the server to extend the life of the server and database. For other maintenance recommendations such as application of Microsoft service updates or patches, work with your internal teams.

Professionalism

Customers can expect professional behavior during any interactions with employees of Latitude by Genesys. Report any concerns or incidents of unprofessional behavior to Latitude by Genesys management so that we can review and address the issue.

Conversely, Latitude by Genesys expects customers to maintain professional behavior during any interactions with employees of Latitude by Genesys. Latitude by Genesys reserves the right to refuse support to individuals for any of the following:

- Deliberately hanging up on Latitude by Genesys employees.
- Use of abusive, intimidating, or obscene language.
- Deliberate misrepresentation of the facts to Latitude by Genesys employees.

Customers must provide level one support

All customer organizations are bound contractually to provide the first level of support. Customer responsibilities include the following:

1. Be the interface for all communication with users.
2. Establish and communicate a phone number where users can reach you for support both during and after business hours.
3. Provide sufficient staffing to handle the volume of support issues in a timely manner.
4. Premise customers must provide support for all hardware and third-party software.
5. Attempt to reproduce all issues in a comparable test environment.
6. Keep your system up-to-date with new fixes.
7. Migrate to new versions as they become available.
8. Work with network technicians to ensure a high level of service.
9. Ensure that third-party software applications that interface with Latitude by Genesys products are working and available.
10. Complete all troubleshooting tests that Latitude by Genesys Support requests.
11. Gather and deliver all logs and files that Latitude by Genesys Support requests.

Note: If an unauthorized user contacts Latitude by Genesys Support directly, we refer them back to your certified resources.

Use of a development or test environment

Customers must test any major system modifications or additions of new features to their system thoroughly in a development or test environment. Customers must install new versions of software and new Service Updates in their development or test environment before attempting to install them in any production environment. A development or test environment does not require a high-end server, but it must allow an application engineer to verify new functionality before pushing it to a production environment. The development or test environment must match the production environment as closely as possible.

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