Customer Support Services Guide

Foreword

Services

Welcome to eCopy™.

The goal of this guide is to provide information about the services offered by eCopy's Customer Support Services, Educational Services, and Professional Services groups. Many of these services are complimentary to those offered by eCopy's sales partners. It will help you determine where to find technical assistance and how to resolve any questions or problems you encounter.

A key part of our services delivery mechanism is the *Ask eCopy* system. It provides web-based access to a knowledgebase where you can find a wide range of eCopy related documents, such as: product specifications, product installation instructions, technical tips, how-to guides. If you are unable to find a resolution to your question in the knowledgebase, the *Ask eCopy* on-line ticket tracking system will allow you to send details of your situation. *Ask eCopy* will route the ticket to the appropriate eCopy or partner organization for action. You will be able to track progress of your tickets via the same interface. Also, tickets are not limited to traditional technical support issues; you can also submit requests for product enhancements, billing questions, etc.

We will publish on-going updates to this guide to keep you up-to-date on the services offered by the eCopy services groups. You can obtain the current version of the Customer Guide to Support Services from our technical support web site at www.askecopy.com or by subscribing to the associate knowledgebase document in *Ask eCopy*.

We also request that you provide us input on your experiences with our services groups. And we always welcome ideas on ways to improve the products and services. Please use the *Ask eCopy* interface to send your comments and suggestions. A member of our management team will contact you to discuss your issue or suggestion.

Contents

Support At A Glance

eCopy offers a range of support programs that allow you to tailor a package to meet your individual business needs. These programs and services are described in this guide.

This guide focuses on Customer Support offerings (technical and administrative), but also includes descriptions of education and consulting services. Contact information is provided in these sections and as part of the contacts lists found later in this guide.

This guide is intended for use by both the end user community and the eCopy sales and distribution partners.

Ask eCopy

The *Ask eCopy* system is the main delivery vehicle for eCopy support services.

The _Ask eCopy_ system is a Web-based Customer Relationship Management (CRM) system built around a robust knowledge management system. The system includes an integrated ticket (case) tracking system.

End users and can use the self-help features of the knowledgebase on a 24 x7 basis, 365 days of the year. Anyone that has purchased or has an evaluation copy of eCopy software will have access to the knowledgebase.

There are multiple interfaces to the *Ask eCopy* system, each tailored to specific tasks:

Section icon	Section	Description
	Customer Support	Product Licensing, Registration, Activation, and other non-technical issues
	Technical Support for All Product Lines	How to guides, problem resolution guidance, configuration checklists, etc. for all eCopy platforms
	Technical Support for eCopy Scan to Desktop and eCopy Desktop™	How to guides, problem resolution guidance, configuration checklists, etc. for end user focused products
	RMA Processing	To request replacement parts for failed hardware components covered under an eCopy warranty program
	Enhancement Requests	To provide product feedback and requests for functionality in future products

Full details on using the Ask eCopy system can be found in the Ask eCopy Primer, Answer ID #295 in the knowledgebase. http://www.askecopy.com

Customer Support Services Programs

This section contains descriptions and important details regarding eCopy Customer Support Services programs. If you have questions regarding these programs, please contact your eCopy Sales Manager, eCopy Technical Consultant, or 'Open a Ticket' in the *Ask eCopy* system.

Participation in most programs is contingent upon the customer/end user having registered their products within the eCopy Product Registration site at www.ecopy.com/registration and having a currently effective eCopy Maintenance and Services (M&S) Agreement for their products.

Standard Support

Standard Support is the foundation for all eCopy Customer Support Services programs and supplemental services.

Standard Support services are provided through authorized Dealers/Distributors for their customers/end users that have <u>purchased and registered Maintenance and Support (M&S) Agreements</u>. Agreements are available as part of the initial purchase of product with separately purchasable one year add-ons. This is designed to provide co-terminus support for multi-function device (MFD) lease periods.

With standard M&S agreements the customer/end user contacts their dealer/distributor for first level support. This includes questions on product installation and operation. If the dealer/distributor requires assistance, their technical resource will escalate an issue to eCopy Customer Support Services on the customer/end user's behalf. The web-based *Ask eCopy* system will be used by the dealer/distributor to track and escalate issues.

For customer/end users: Standard Support provides:

- 24 x7 access to the *Ask eCopy* online knowledgebase (http://www.ecopy.com/Support_Ask_eCopy.asp)

For authorized dealers/distributors: Standard Support provides:

- 24 x 7 access to the *Ask eCopy* online knowledgebase (via login to the eCopy Solution Provider Network - eSPN www.ecopy.com/espn))

- Ability to 'Open a Ticket' in the *Ask eCopy* system on behalf of customers covered under product warranty and/or a currently effective Maintenance and Support Agreement.
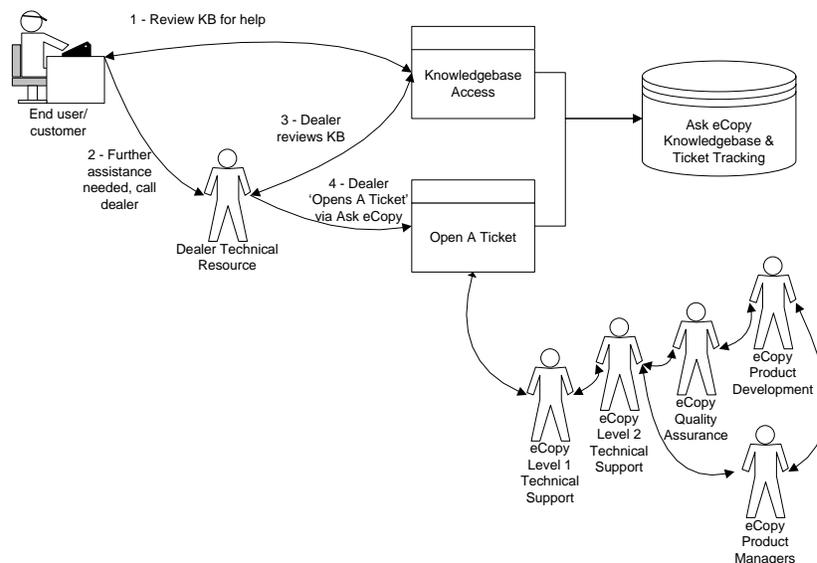
Standard Support includes:

Unlimited Access to Self-Service Resources; available 24 hours a day, 365 days a year for registered and qualified *Ask eCopy* users. (See page 11)

- *Ask eCopy* **Knowledgebase** containing Support Notes, Technical Alerts, White Papers, FAQ's, Product Documentation, Release Announcements

- **Access to eCopy's Ticket Tracking System** for dealer's/distributor's authorized contacts to create, search, update, and track status of support tickets

- **Priority handling of critical situations** during normal business hours. *Ask eCopy* Tickets opened for P1 (System Down) situations [see definitions section] will receive priority attention.

- **Access to Product Updates and Service Packs** through the *Ask eCopy* system.

Please Note:

Customers/end users must complete the process outlined in *Ask eCopy* Answer ID #334. This document is available without logging in to the system.

Dealers and Distributors must create their account on the eCopy Solution Provider Network, eSPN www.ecopy.com/espn to ensure proper access to brand specific documents.

Supplemental Services

This section contains descriptions and important details regarding supplemental eCopy Support services. For further details:

- Customers should contact their eCopy authorized dealer.

- Dealers and distributors should work with the eCopy Sales Manager or Technical Consultant.

Developer Support

Developer Support is a <u>fee based</u> service that provides assistance to application developers utilizing the eCopy SDK to create custom document capture applications. Typically Developer Support issues are limited to no more than 16 hours effort per incident and include topics such as:

- Assistance creating or debugging custom code or applications

- Information on the usage and best practices of eCopy development tools and methods

- Walk-through and clarification of documented components, tutorials, and examples

- Questions related to modifying out-of-the-box functionality

- Diagnosing suspected bugs in custom applications and development tools

To access the Developer Support program a purchase order or credit card must be on file for billing purposes. (To sign up for the program, go to www.ecopy.com and click on Partners > Software Alliance Programs.) Most work is delivered remotely on an hourly basis during eCopy's normal business hours. This program is not designed for ongoing day-to-day support of customized systems, e.g. staff augmentation.   Longer term development assistance can be arranged via eCopy Consulting Services (talk to your eCopy Sales Manager or Technical Consultant to arrange this).

After signing up for the program, the process for accessing Developer Support is:

1. **Open an *Ask eCopy* Developer Support Ticket,** following instructions provided in your welcome package. Include your Developer Support account number in the ticket description. This account number is provided when you purchase Developer Support.

2. A Developer Support Consultant will contact the call originator within two business days to establish a project schedule and allocate resources.

3. Time is deducted from your account as effort is applied to resolving your Ticket.

Migration Support

Migration support is designed for Customers who are upgrading from previous eCopy product versions or converting from other products to eCopy.

Infrastructure Planning provides a review and planning process to ensure that customers have a thorough understanding of the infrastructure and product changes required in migrating to newer products:

1. **System Profile Data Collection** eCopy will assist in collecting a detailed profile of products, versions, platforms, operating systems, product key inventory, etc. in the current production environment.

2. **Migration Impact Evaluation** is performed to assess the current system and the impact of migration by providing before and after functionality summaries and a recommended upgrade sequence.

3. **Migration Review** for a point-by-point discussion to review migration issues. The plan will assist in setting essential milestones based on end-of-support dates and the interoperability of infrastructure elements such as the operating system and database.

4. **Review Follow-up** to resolve any action items from the Migration Review.

5. **Post Migration review.**

To obtain a quote for migration support, customers should contact their dealer. Dealers should work with their eCopy Technical Consultant or Open a Ticket in *Ask eCopy*.

After-Hours Support

After-Hours Support is ideal for Customers who have projects such as upgrades and rollouts scheduled to occur outside of normal business hours. This program provides a safety net by having eCopy Support personnel available for calls during specified hours.

To request a quote for After-Hours Support, the dealer should open an *Ask eCopy* Ticket. A minimum of two weeks advance notice is required to ensure availability of resources. Systems containing custom code/applications may also require Developer Support. In most instances, we require that you perform a successful pre-upgrade/migration test, provide a written plan, and have a verified backup and recovery procedure in place.

Working with eCopy Support

Getting Started

The following is a summary of the resources available, process to establish support accounts with eCopy, which are required before any Customer Support activities can take place, and how to originate a Technical Support Ticket.
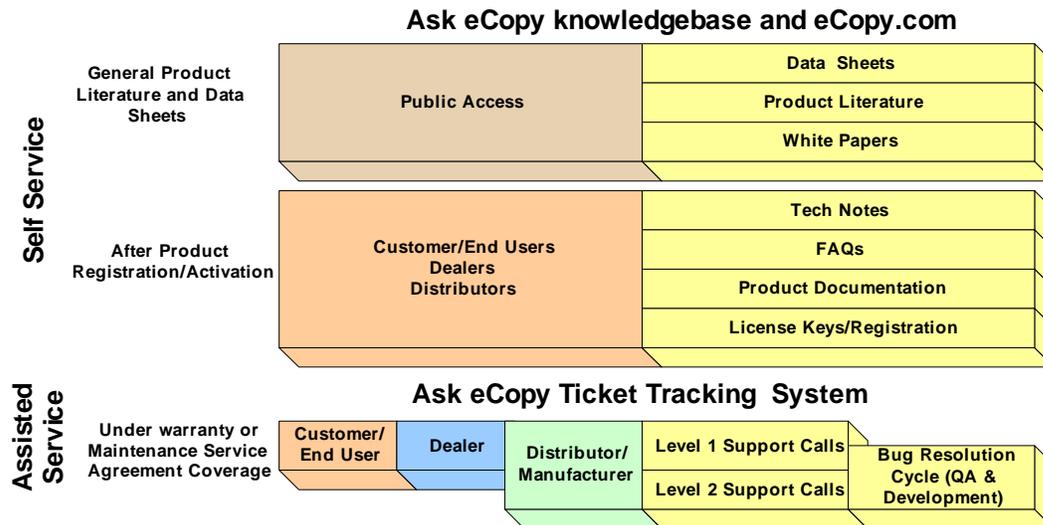
Prior to accessing the eCopy Customer Support Services organization, the dealer or customer must register their eCopy products at www.ecopy.com/registration. (For issues at initial installation, the ticket must include product key and/or Maintenance & Support Agreement numbers.) The dealers and/or distributors can assist in this Web driven registration process.

Please refer to the Product Activation and Registration Policy and Procedure document for full details.

Customer Support Service Resources

There are various technical resources available to Customer/End Users, Dealers, and Distributors/Manufacturers. There are two basic categories of service: Assisted and self service.

The graphic below depicts the various services and access paths.

Ask eCopy knowledgebase and eCopy.com

Self Service			
General Product Literature and Data Sheets	Public Access	Data Sheets	
		Product Literature	
		White Papers	
After Product Registration/Activation	Customer/End Users Dealers Distributors	Tech Notes	
		FAQs	
		Product Documentation	
		License Keys/Registration	

Ask eCopy Ticket Tracking System

Assisted Service					
Under warranty or Maintenance Service Agreement Coverage	Customer/ End User	Dealer	Distributor/ Manufacturer	Level 1 Support Calls	Bug Resolution Cycle (QA & Development)
				Level 2 Support Calls	

Self Service Resources

Prior to opening a support call with an authorized dealer/distributor, the customer/end user may want to check some of the *Ask eCopy* self-service resources. Often you can find an answer to a question in the online FAQ's.

Many of the self service offerings require a log in and password for access.

Dealers and Distributors have accounts automatically generated when they create their eSPN account.

Customers/End users should go to www.askecopy.com and search for Answer ID # 334, "How to set up *Ask eCopy* end user account", which details the process for establishing a user account.

Prior to establishing your login and password, you will need to register the product at www.ecopy.com/registration. One of the following items: Product Key, Maintenance & Support Agreement, or software serial number, is required to register a product. Instructions are available on the registration site.

The graphic on the previous page outlines the self service features available to all Customers and end users, 24 hours a day, 365 days a year at http://www.askecopy.com

We encourage you to become familiar with these resources by browsing the knowledgebase and reviewing on-line instructions to better understand how to make use of these features before problems and questions arise.

Resolving Problems

The fastest way to answer a question or resolve a problem is to access the knowledge base and find relevant product documentation, support notes, technical alerts, white papers, and problem resolution information. The content is word-in-text indexed to provide fast, accurate searching through the hundreds of available documents.

The self-service resources are available to all end user customers 24 hours a day, 365 days a year. Many questions and problems can be resolved through the self-service resources and we strongly encourage customers to make use of them and provide feedback so that we can expand and improve their value.

If the customer cannot resolve their question by using the knowledgebase, or if the problem is critical (such as a system down), an authorized contact should contact the dealer and request the opening of an *Ask eCopy* Ticket.

Assisted Service Resources

This category involves issues that require human interaction to solve product issues or questions. Typical issues might include: product installation, configuration and usage questions, or reporting of suspected bugs in the software.

These situations are handled by the dealer opening a Technical Support Ticket on behalf of the end user customer. The dealer network is supported by their distributor/manufacturers, which then has access to eCopy's Technical Support organization via the *Ask eCopy* system.

End user customer product support issues requiring escalation to eCopy must be in reference to product currently covered by a Maintenance & Support Agreement and are registered with eCopy.

Critical Situations

In situations where a dealer field technician does not have access to the internet while working at a customer site, he/she may call the eCopy Customer Support Services Center and request that a ticket be opened under their account. In these situations:

- An eCopy Customer Support Services Call Dispatcher will open a ticket on the field technician's behalf
- The field technician should be able to clearly define the situation and detail steps that need to be taken to recreate the issue
- The ticket will be opened under an agreed to Priority status and then put in the ticket queue to be addressed.

Please note, in critical situations every effort will be made to find an available eCopy Technical Support Engineer or Account Development Specialist to immediately address the issue. However, due to call/ticket volumes, current staffing levels, etc. it may not be possible to pass a call directly to an appropriate resource. In these situations the *Ask eCopy* ticket queuing system will ensure that the ticket is dealt with based on its priority and time of receipt. An appropriate resource will call back as soon as possible.

Maintenance & Support Agreement Start dates
Maintenance & Support Agreement start dates are the earlier of product activation or 120 after shipment from eCopy's manufacturing site.

Opening an *Ask eCopy* Ticket

Ask eCopy has several interfaces tuned to the major support categories.

Based on user feedback and system usage analysis, the eCopy Support page user interface has been split into five separate sections. Each section will provide direct, one click access to the:

- Most frequently access documents
- Streamlined, specialized **Ask eCopy** interfaces

Dealers and Distributors should always access **Ask eCopy** by first logging onto eSPN.

End Customers can access the system via the eCopy Support page at www.ecopy.com/support

Each of the *Ask eCopy* interfaces is listed below with its main focus:

Section icon	Section	Description
	Customer Support	Product Licensing, Registration, Activation, and other non-technical issues
	Technical Support for All Product Lines	How to guides, problem resolution guidance, configuration checklists, etc. for all eCopy platforms
	Technical Support for eCopy Scan to Desktop and eCopy Desktop	How to guides, problem resolution guidance, configuration checklists, etc. for end user focused products
	RMA Processing	To request replacement parts for failed hardware components covered under an eCopy warranty program
	Enhancement Requests	To provide product feedback and requests for functionality in future products

Each will have:

- Links to the most frequently used documents of the section (eliminates searching)
- One click access to the full user interface

The knowledgebase articles in each interface are a focused subset for the issues at hand. For example, when visiting the Customer Support interface, users will only see documents focused on Product Licensing, Registration, Activation, and other non-technical issues.

When opening tickets, a function specific user interface will be presented. For example, the RMA interface will collect all information needed to process an RMA, while the Technical Support interface will collect information to qualify Software related issues.

For a more complete explanation of the Customer Support Services sponsored interfaces and their components, please see *Ask eCopy* answer ID #295 – the *Ask eCopy Primer.*

There is also an Enhancement Request interface to streamline submission of requests for product enhancements. Though accessed via the Support page, responses to these requests are managed by the eCopy Product Management team.

Escalated Tickets

If a Ticket is escalated to eCopy via your Dealer/Distributor, an eCopy Technical Support Engineer or Account Development Specialist will be assigned to 'own' a Ticket and work with the dealer to understand, recreate, and/or resolve the problem.

In some instances, it may be beneficial to the eCopy technician to obtain access to your eCopy system via remote access (i.e. WebEx). Remote access may also be required in some circumstances to ensure prompt diagnosis and resolution of highly complex problems. You can be assured that eCopy recognizes the confidential nature of your systems and data and that remote access is always under your supervision, short term, and for the express purpose of resolving the issue at hand.

Support Ticket Escalation

If you are not satisfied with the progress of your Ticket, please escalate your concerns to a member of our management team.

Contact the Customer Support Services (CSS) Center at eCopy Corporate, in Nashua, NH, USA

Between the hours of **7AM and 8PM Eastern US**,

at phone number **+1.603.324.8400 and listen to the available options**

One of the CSS Call Dispatchers or other staff members will take your call.

Please explain your concern and ask to be transferred to one of the CSS management team members. If someone is not immediately available, you should receive a call within an hour.

Hours of Operation/Local Language Support

Local language support (English) is provided by the eCopy Customer Support Services Center located at the corporate offices in Nashua, New Hampshire.

The center is open Monday through Friday 7:00AM through 8:00PM Eastern Time, except on eCopy holidays.

Additional language capability is provided through designated eCopy Distributors and Technical Support Partners. These Partners provide local language support in regions where eCopy does not have a presence.

Important Policies

This section contains important policies regarding the delivery of eCopy support programs and supplemental services.

Ticket Priority Levels and Performance Goals

Various factors influence eCopy's ability to resolve problems. Some of these factors are outside of the control of eCopy. The following response and resolution goals are intended to provide a framework for setting mutual expectations rather than to serve as a guarantee. The response times are in relation to the time an *Ask eCopy* ticket is first received at the eCopy Customer Support Services Center. All times are based on our normal business hours.

Priority	Definition	Initial Response Goal	Resolution Goal
P1 – Critical	An established production system is inoperative; business operations are critically impacted; no work can be done.	2 business hours	1 business day
P2 – High	A production system is significantly impacted; a development system is inoperative; work can be done but is severely limited. A new system installation is experiencing issues	4 business hours	3 business days
P3 – Standard	An 'ordinary' problem or question. Work can be done, but non-critical features may not function.	8 business hours	10 business days
P4 – Low	A low-urgency problem or question; minimal system impact; enhancement requests	24 business hours	20 business days

Mutual Resolution Commitment for P1 Tickets

If a Customer/End User encounters a serious problem resulting in the opening of a P1 ticket, eCopy's objective is to help that Customer get their system(s) back to an operational state, to the fullest extent possible, as quickly as possible to minimize disruption of business critical processes.

eCopy will apply all appropriate resources to meet this objective. It is presumed that the Dealer and Customer are also willing and able to apply the necessary resources towards this objective. If a Dealer or Customer is not able or willing to apply appropriate resources (human and/or technical) to resolving P1 issues, the Ticket priority may be downgraded at eCopy management's discretion.

Criteria for Closing Tickets

Tickets remain open until one of the following events occurs:

- eCopy provides Dealer/Distributor with a solution that the Customer/End User confirms resolves the problem.

- In situations where eCopy has provided an answer/fix to the Dealer/Distributor and not received feedback that further work is requested/required within five (5) business days. (*Ask eCopy* will send a confirming e-mail notification.)

- An Authorized Contact asks eCopy CSS to close a Ticket: verbally, via ticket conversation thread, or selection of the ticket closing checkbox in the *Ask eCopy* – My Stuff – Ticket update interface.

Ask eCopy Tickets may be in a suspended state when the following events occur:
- If a bug is identified and escalated internally at eCopy for QA/Development attention:

    - Technical Support will manage the ticket through the escalation process until a Hot Fix, Service Pack, or New Product release containing a resolution is available. A note will be placed in the ticket providing the status and when to expect a further update or delivery of the fix.

    - When a solution is available, eCopy will update the ticket and notify the Customer/End User via the Dealer/Distributor network.

    - If eCopy is not notified of solution's status within five (5) business days of delivery to Dealer, it will be assumed that the ticket is closed.

- If a configuration is determined to be unsupported. This may occur if the MFP configured is not on the eCopy Supported Device list published on the eCopy Corporate Web site (http://www.ecopy.com/Support_Supported_Devices.asp) and/or the MFP firmware level is unsupported and/or components or the customer infrastructure are unsupported (e.g. application severs).

If any ticket is closed prematurely, it can be easily reopened by calling your dealer/distributor, they will contact their eCopy Support Center.

Product Release Types and Duration of Support

Maintenance Releases

Maintenance Releases, or point releases, are upgraded versions of the software that address defects or deficiencies in the software, adapt the software to support different platforms, and may provide minor functionality enhancements to improve the software's usability.   Maintenance Releases are designated by the number to the right of the decimal point in the version number (e.g., eCopy™ ShareScan® v4.0 to v4.1 or eCopy Desktop™ v9.0 to v9.1).

Maintenance Releases have been fully tested by QA and are released for all supported platforms and languages. An installer is included with the software to walk users through the process of installing the Maintenance Release.

Service Packs

If critical updates to address known problems are necessary before the next scheduled Maintenance Release, a Service Pack will be created. Service Packs are cumulative and contain all of the fixes in previous Service Packs. A Service Pack 3, for example, would include all of the updates and fixes that were in Service Packs 1 and 2. Service Packs are cumulative so you do not need to install a previous Service Pack before you install the latest version.

Service Packs have been fully tested by QA and are released for all supported platforms. An installer is also included with the software to walk users through the process of installing the Service Pack.

eCopy will schedule the release of Service Packs every three to four months, as needed.

HotFixes

HotFixes are situation specific updates that may be applicable to a single site. Hotfixes do not have an installer and contain only the new .DLLs necessary to repair the issue. Since a Hotfix contains a fix for a specific issue, it does not go through the normal QA process or full regression testing. Limited testing is done in a controlled lab that mimics the customer environment as much as possible. No other supported platforms are tested. Using a Hotfix provided for another situation may cause unpredictable results. As such, Hotfixes are not available for public download and are only distributed on a case by case basis directly from eCopy Technical Support.   Hotfixes will be the exception, not the rule.

Distribution of maintenance releases, service packs, and *hotfixes* are available only to users of registered eCopy software currently covered under a Maintenance & Support Agreement or standard product warranty coverage. Software can be registered at www.ecopy.com/registration.

Distribution of these packages is handled through different mechanisms.

- Maintenance releases – downloads from the eCopy Upgrade section of the Registration site (www.ecopy.com/registration)
- Service Packs – downloads from the *Ask eCopy* knowledgebase for registered *Ask eCopy* users.
- HotFixes – provided directly by eCopy Technical Support, to remedy specific situations, with links made available through *Ask eCopy* Ticket responses.

eCopy Product Management will decide how a remedy will be distributed. When an *Ask eCopy* ticket is escalated and a resolution is defined, the associated *Ask eCopy* Ticket will be assigned a specific status which will be communicated to the Ticket Holder.

The *Ask eCopy* Ticket status will be set to reflect the release timing based on the Product Manager's decision. For example,

- *Pending Next Service Pack* (fix is scheduled to be in next Service Pack)
- *Pending Next Release* (scheduled for next Maintenance [point] release)
- *Pending Future Release* (scheduled to be reviewed for inclusion in an undetermined, future release)
- *No Plans to Fix (the functionality desired by the customer is not in line with the general direction of the product)*

Issues to be handled via a HotFix will be assigned a *Pending QA* or *Open* status. A note will be placed in the ticket that a HotFix is being developed and a target delivery date may be provided. Not all HotFixes will be designated for inclusion in the general software application.

Schedules for Maintenance releases and Service Packs are maintained by eCopy Product Management. Both are general releases that are for use in all product environments. They are put through a full QA test cycle and prepared for distribution by Release Engineering. The time between designation of availability and product release may be several weeks to months.

Support Duration

eCopy supports the current release of product and one major release past. For example, if the current release level is 2, version 2 and version 1 are supported. In this example, upon the release of version 3, the support for version 2 would continue and the support for version 1 would cease.

Extended Support may be made available for most product releases to extend support for up to an additional 24 months beyond the normal, published end-of-support dates. Please submit an *Ask eCopy* Ticket to request a quote for Extended Support pricing.

End-of-Support dates for currently supported releases are published on-line through the 'Product Information System' feature at
http://www.ecopy.com/Support_End_of_Life_Information.asp.

Supported Environments

A list of currently supported products and versions is published on-line through the "Supported Platforms" and "Product Lifecycle" at http://www.ecopy.com/Support_Supported_Devices.asp. This environment information specifies the MFP products and model numbers compatible with eCopy products. Customers are required to run products in the environment specified for the particular version of a product in order to receive full technical support.

Unsupported Environments

eCopy does not provide technical support or product maintenance for unsupported environments.

Extended Support Environments

The Extended Support program is intended to provide additional flexibility in continuing status quo operations for Customers who are in the process of upgrading or migrating to current eCopy product versions but may need additional time to do so. Support may be extended for the environments by purchasing extended support. Please note that support for additional infrastructure environments and versions (i.e. operating systems, databases, browsers, application servers, etc) that are not specified by eCopy as being supported are not included.   Please open an *Ask eCopy* Ticket for details and cost information for extended support.

eCopy Holiday Schedule

Please see the *Ask eCopy* FAQ # 309 for the current list of eCopy Company Holidays.