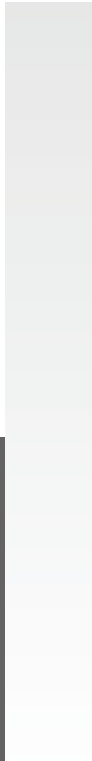
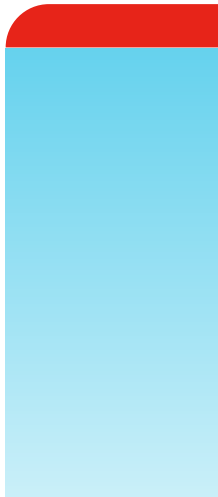


# FortiCompanion to Technical Support



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## Introduction

Consistent service and the reliability of your security infrastructure are critical to the business success of your organization. To address these requirements, the FortiCare service portfolio provides a comprehensive set of programs, including global coverage for technical support services and security threat management.

The aim of the FortiCompanion handbook to provide you with the information to understand and make best use of the services available to you as a valued customer. This guide is focused on our Technical Support Services. For a more detailed description, you may also refer to the Fortinet Service Terms & Conditions or specific service descriptions available via the Support Portal.

## Overview of Support Teams

Technical Support is organized by geographies and technologies to provide global coverage, allowing each group to focus on providing the right answer or solution at the right time. Our real-time model ensures support continuity with chat engagement, resource accountability, escalation, and access to the right expert for solving the problem as quickly as possible. The assignment of tickets to the appropriate support team and automated management alerting when required enable us to ensure that our product experts are focused on debugging and solving the most complex of requirements within SLAs. For customers who require faster problem-solving with a proactive and personalized level of assistance, our Advanced Support options provide a range of service packages helping customers to maximize the value in their support solution.

To facilitate resolution of incidents, each regional team is equipped with a state-of-the-art FortiLab, containing a full range of Fortinet appliances, third-party equipment, as well as industry-standard traffic generators. The FortiLab utilizes a network layout and management interface developed in-house by Fortinet support engineers based on their requirements and needs. As a result, complex setups are made easy, and configurations and software versions can be modified at a click, which allows our support engineers to spend more time analyzing data and responding to customers.

## Technical Information Sources

FortiCare services entitle you to a wealth of information in a range of formats to assist in the deployment and maintenance of your Fortinet products. The following technical sites all have RSS feeds available to allow you to keep up to date with the evolving security landscape.

URL	Resource
<a href="#">Community</a>	Fortinet has a knowledge- centered approach made available through the community platform. This is continuously maintained with a Knowledge Base and forum, enabling answers for many problems to be available instantly through a powerful search capability that spans multiple repositories. With an active community, technical notes and tips, troubleshooting steps, and guides are constantly updated through external and internal technical resources.
<a href="#">Documentation</a>	This site provides access to Fortinet product documentation that includes admin guides, reference manuals, release notes, hardware manuals, quick start guides, and cookbooks.

## Global Technical Support Teams

Technical Support is delivered via our Global Technical Assistance Centers. Each geographical region has a Center of Expertise, supplemented by regional support centers providing for regional and local language support. A number of Enhanced Technology Technical Assistance Centers (eTAC) that specialize in key products are also hosted in regional support centers.

The entry point via telephone is through our Customer Services team, who provides call center services and intelligent routing of incoming service requests. The Global Technical Assistance Centers deliver technical support to their regional customers as well as provide follow-the-sun assistance to ensure 24x7x365 global support coverage.

Americas **Center of Expertise:**  
Vancouver (Canada)

**Regional Support Centers:** Ottawa (Canada), Sunnyvale (USA), Bogota (Colombia), Dallas (USA), Miami (USA), New York (USA), Concord (USA), Mexico City (Mexico)

Asia Pacific **Center of Expertise:**  
Kuala Lumpur (Malaysia)

**Regional Support Centers:** Manila (Philippines), Beijing (China), Seoul (South Korea), Sydney (Australia), Tokyo (Japan)

Europe, Middle East, and Africa **Center of Expertise:**  
Sophia Antipolis (France)

**Regional Support Centers:** Lisbon (Portugal), Bangalore (India), Dubai (UAE), Frankfurt (Germany), Prague (Czech Republic)



URL	Resource
<a href="#">Video Guides</a>	These tailored videos provide a free learn-as-you-go-type capability to enable you to become proficient with Fortinet technology.
<a href="#">FortiGuard Center</a>	<p>The FortiGuard Security Portal provides summaries of the latest internet threats, security advisories across popular vendor technologies, and access to the latest Hot Bulletins. You can also find details of specific malware through the encyclopedia and a database of over 4 million records.</p> <p>Finally, you can access the signature database for specific security services such as antivirus, intrusions, and web filtering.</p>

## Software Download Center

The Download Center provides access to firmware images for Fortinet products, including feature and patch releases.

There are three types of FortiOS releases available:

- **Major Release: 7.0.x**  
Contains major changes to functionality and are generally available every three years
- **Minor Release: 7.2.x**  
Contains minor changes to functionality and are generally available every 12 months
- **Patch Release: 7.2.2**  
Contains bug fixes to customer reported problems and are generally available on a rolling 4- to 8-week window (depending on the specific product)

The decision to upgrade firmware requires analysis and planning. New firmware can bring valuable new features or include important bug fixes that will add value to the services delivered. This needs to be weighed against the criticality of the IT services being supported and secured.

To assist you through the process, Fortinet provides detail on new features, bug fixes, and upgrade instructions in the Release Notes associated with all new versions and patches. It is key that you consult this documentation as an integral part of your change control program.

Access to firmware images is available after login to the Support Portal using the software/firmware Download Center: <https://support.fortinet.com/Download/FirmwareImages.aspx>

## Technical Support Tickets

At some point in the life of your Fortinet appliance, you may need to raise a technical support ticket. To create a ticket, either contact Customer Service by telephone, log in to the Support Portal, or open a chat session. If you have a Priority 1 or Priority 2 issue, you must use the telephone to raise the incident. For customers with FortiCare Essential support contracts, the raising of technical support request must be through the online channels.

## Contacting Technical Support

- Telephone access to support is via global toll-free numbers: <https://www.fortinet.com/support/contact>
- Webchat provides a mechanism to obtain quick answers to technical questions or requests for information. This is available after login to the Support Portal or from the link at: <https://www.fortinet.com/support/contact>
- The Support Portal provides a range of additional options, including viewing Customer Support Bulletins, accessing Asset Management and Life Cycle Management information, as well as the capability to create and monitor support tickets. The Support Portal is available at <https://support.fortinet.com> and for FortiPartners via <https://partnerportal.fortinet.com>.



## Ticket Priority Definitions

Priority	Definition and Customer/Fortinet Responsibilities
Priority 1	<p>Any technical ticket created for an incident that causes a total loss or continuous instability of mission-critical functionality in a live or production network environment. Examples are:</p> <ul style="list-style-type: none"> <li>■ Catastrophic impact to mission-critical functionality</li> <li>■ An outage impacting multiple active user sessions and/or critical traffic</li> <li>■ A major loss of connectivity</li> <li>■ A vital security flaw impacting active business services</li> </ul> <p>The customer and Fortinet both commit to dedicate technical resources 24 hours a day, 7 days a week, 365 days a year by telephone and remote sessions.</p> <p>If a workaround is accepted, a Priority 1 ticket will be reclassified in priority. Workarounds may include:</p> <ul style="list-style-type: none"> <li>■ Reverting configuration changes</li> <li>■ A firmware upgrade or downgrade</li> <li>■ Replacement of the hardware</li> <li>■ A change to the configuration</li> </ul>
Priority 2	<p>A technical ticket created for an issue that causes significant impact to mission-critical functionality in a live or production network environment. Examples are:</p> <ul style="list-style-type: none"> <li>■ Serious loss or frequent instabilities of mission-critical functionality impacting active user sessions</li> <li>■ Loss of redundancy of a critical component impacting live business services</li> </ul> <p>The customer and Fortinet commit to dedicate technical resources 8 hours a day, 7 days a week for Priority 2 tickets. If a workaround is accepted by the customer, a Priority 2 ticket will be reclassified in priority.</p>
Priority 3	<p>Any technical ticket created for an issue in the customer network that has minimal impact to business operations. An example is occasional or intermittent instabilities of core functions.</p> <p>A Priority 3 ticket may also cover any outstanding troubleshooting or investigation for a Priority 1 or Priority 2 incident for which a workaround has been accepted.</p> <p>Fortinet and the customer will assign resources 8x5 during business days until a resolution or workaround has been provided.</p>
Priority 4	<p>Any technical ticket created for additional information, including basic configuration assistance, errors in documentation, or minor defects that do not impact business services.</p> <p>Fortinet and the customer will assign resources 8x5 during business days until a resolution or workaround has been provided.</p>

## FortiCare Service Contracts

FortiCare Technical Support Service contracts include access to the Support Portal, the ability to contact the Fortinet TAC for customer service assistance on a 24x7x365 basis, as well as resolution of technical tickets, access to software updates (maintenance and feature releases), and the replacement of hardware determined by Fortinet to be defective based on the purchased service level.

## Ticket Creation via the Support Portal

When you create a technical support ticket, you will be requested to provide a specific set of data aimed at facilitating ticket resolution. To troubleshoot complex incidents, our support teams need to fully understand the network topology and role of the Fortinet device(s) in it. Providing device configuration and all available log files provides a good starting point for the investigation of your issue and therefore should be attached to all new support tickets. Please refer to the following Knowledge Base article for examples of information to provide per product family: <https://community.fortinet.com/>.



## Ticket Handlings SLAs

The FortiCare Service contracts include service level agreements (SLAs), based on the service level purchased, that are aimed at ensuring communication for a timely initial response as well as transparency during the ticket resolution process.

- The Initial Response Time is the length of time before a qualified TAC representative contacts the customer.
- The Update Frequency Interval is the length of time between updates by the Ticket Owner when a Fortinet action is pending.

FortiCare Support				
	ESSENTIAL	PREMIUM	ELITE (FGT)	ELITE (ETAC)
<b>Initial Response Time</b>	P1: n/a	P1: 1 Hour	P1: 15 Mins	P1: 15 Mins
	P2: n/a	P2: 1 Hour	P2: 15 Mins	P2: 15 Mins
	P3: Next Business Day	P3: Next Business Day	P3: 2 Business Hours	P3: 4 Business Hours
	P4: Next 2 Business Days	P4: Next 2 Business Days	P4: 4 Business Hours	P4: Next Business Day
<b>Update Frequency Interval</b>	P1: n/a	P1: 6 Hours	P1: 3 Hours	P1: 3 Hours
	P2:n/a	P2: Daily	P2: 12 Hours	P2: 12 Hours
	P3: Next Business Day	P3: 3 Business Days	P3: Each Business Day	P3: Each Business Day
	P4: Next 2 Business Days	P4: 5 Business Days	P4: Every 3 Business Days	P4: Every 3 Business Days

## Ticket Progress

Once a ticket has been created, you will receive a ticket number and the incident will be assigned to a Support Engineer in accordance with the ticket priority. You can expect to receive an Initial Response either by telephone or email. Each time you receive an update, this will be logged within the Support Portal.

Based upon the nature and complexity of the incident, the ticket may be escalated internally, in which case this will be clearly indicated.

The Technical Support Engineer will focus on providing a resolution as well as a workaround to reduce the business impact. During the ticket resolution process, the Technical Support Engineer may:

- Suggest configuration changes
- Request access to the appliance for troubleshooting purposes
- Replicate the scenario in the lab
- Log a bug when the root cause has clearly been identified as a software defect

If a ticket solution has been isolated to a defect, the Technical Support Engineer will open a Bug Report with the Engineering Group. A Bug ID will be assigned and reported back to you in the ticket. Once the defect is resolved, it will typically be incorporated into the next patch release.



The ticket resolution process requires constant communication and collaboration. To facilitate closure, there is an automated mechanism to prompt for updates. When a customer action is pending, the system will send a reminder email after three days, with a second reminder email after seven days. If during this 10-day period there is no response, the ticket will move to the status “Pending Close Confirmation” on the eleventh day, at which time a further email requesting feedback will be sent.

If no response is received for a further five days the ticket will be automatically closed on the following day. If feedback is not possible within the notification period, you may contact the TAC engineer to inform them when you are able to provide an update.

### Ticket Status Definitions

Each time a change is made to the status of a ticket you will be automatically notified. The ticket status definitions can be viewed on the Support Portal as outlined below.

Status	Definition
Registered	A new ticket has been opened and is pending assignment. The action is with Fortinet.
Researching	The engineer is researching the technical data and will contact you to discuss their findings. The action is with Fortinet.
PendCustFB	The TAC has requested additional information to continue their analysis and is awaiting feedback. The action is with the customer.
RcvdCustFB	This is set automatically whenever you update the ticket. The action is with Fortinet.
On Hold	You have agreed with the TAC to temporarily suspend the ticket resolution process. A ticket will typically be placed On Hold when a customer needs to plan for the capture of additional information or perform other actions in a production environment. On Hold tickets have a commitment for a follow-up date.
PendCloseConf	If a ticket has been in the status PendCustFB for more than 10 days, then it is automatically changed to PendCloseConf. If no response is received to this status change within five days, the ticket will be automatically closed.
PendBugFix	A bug fix request has been submitted to Engineering and a bug number (bug id) communicated.
WaitGARelease	A bug fix has been created by Engineering and is awaiting incorporation into the next GA release.
Resolved-PendGA	A “hot-fix” has been provided. The ticket will remain open until this change has been incorporated into the next GA release.
Solution Provided	A solution has been provided and we are awaiting your confirmation to close the ticket.
Closed	The problem is resolved and the ticket has been closed. A closed ticket cannot be reopened.

### Ticket Escalations and Priority Changes

In certain circumstances, the conditions surrounding an incident may change. This may include a reoccurrence of the problem, an aggravating business impact, or the need for immediate focus on ticket analysis and resolution from both Fortinet Support and yourselves. To allow for this dynamically changing environment, Fortinet Support incorporates the processes of ticket priority increase and ticket escalation that allow for a reassessment of how a ticket is being managed.

#### Increasing Ticket Priority

One method of gaining additional focus on a ticket is to increase the priority and therefore change the associated SLAs. Depending on the ticket priority, this can be achieved either through the Support Portal or by a telephone call to Fortinet support.

P4 → P3	Either telephone or update the ticket in the Support Portal indicating the new business impact
P3 → P2	You must telephone the TAC for all P1 and P2 tickets, including creation and all requests for raising the priority. Customers are not entitled to escalate a ticket to P1 or P2 on a product that only has a FortiCare Essential support contract.
P2 → P1	



## Fortinet Automated Escalation Process

Fortinet implements an automated escalation process to alert the management team as time progresses. This process allows both regional management and global leadership teams to be made aware of issues as they arise, as well as ensuring executive sponsorship to drive action plans and resolution.

The escalation process within Fortinet is based on engaging the appropriate level of management, up to the executive level, to allow momentum of resolution through access to the appropriate resources.

The Priority 1 times are measured in hours, 24 hours per day x 7 days per week. The remaining priorities correspond with business hours. It should be noted that in circumstances where customer technical resources are not available for longer than one hour, the TAC reserves the right to downgrade a P1 to a P2.

<b>Priority 1</b>	<b>TAC Manager:</b> Immediately <b>VP Support:</b> 6 hours <b>VP Sales:</b> 12 hours <b>Fortinet CEO:</b> 24 hours
<b>Priority 2</b>	<b>TAC Manager:</b> Immediately <b>VP Support:</b> 1 business day <b>VP Sales:</b> 2 business days <b>Fortinet CEO:</b> 1 week
<b>Priority 3</b>	<b>TAC Manager:</b> 1 week <b>Regional Sales Director:</b> 1 month
<b>Priority 4</b>	<b>TAC Manager:</b> 1 week <b>Regional Sales Director:</b> 1 month

## Escalating to TAC Management

Before considering an escalation, you should ensure that you have all the prerequisite items in place to support your request and to enable rapid ticket resolution. Typical questions to consider are:

- Have you verified that all relevant information has been provided in the ticket and communicated to Fortinet Support?
- Have you clearly documented in the ticket the increased business impact or extended deadlines caused by the incident?
- Have you informed your management of the situation and assured their availability to engage if necessary?
- Have you designated the appropriate level and availability of technical resources within your organization that are available to work with technical support? This is key, as your assistance will be required immediately for P1 incidents.

Once the escalation conditions have been met and checklist items validated, you should telephone the Technical Support Center ensuring you have the relevant ticket number to hand. The customer service representative will connect you with the on-call duty manager.

A ticket escalation will ensure that you receive our support management's attention. It should be noted that requesting an escalation will ensure a focus of your ticket, but may preclude an accelerated resolution time depending on the complexity of the issue, nor does it imply that the priority of the ticket will be automatically increased.

As required, a technical plan of action will be co-developed to ensure resolution of the technical issue. The assigned manager will update you and any other internal stakeholders, including your account team and upper management, of your ticket progression. The escalation will have been resolved when the following conditions have been met:

- Agreed objectives have been accomplished
- A monitoring phase has passed without incident
- A workaround has been implemented and a final solution has been accepted
- It is agreed that the ticket has been resolved





## Tracking Customer Satisfaction

Our aim is to provide best-in-class support services; as a result, our customer's opinion counts. One of the ways you can communicate directly with support management is by submitting a Customer Satisfaction Survey, which takes just a minute to complete.

The survey tracks your support experience via two metrics: Customer Satisfaction and Customer Effort. Customer Satisfaction captures your overall opinion of how your ticket was handled and Customer Effort the ease of working with Fortinet support teams. To evaluate your effort, you should ask yourself the question, Is there anything that would have made it easier for me to resolve the problem?

The survey can be initiated at any time via the Support Portal, through the "Rate Our Service" button on the Ticket View or the "Feedback" Menu Option. The survey is also automatically sent with each ticket update and upon ticket closure.

In addition to the two ratings of Satisfaction and Effort, there are two further options:

- Free format field to provide the feedback you feel is important for us to hear
- A checkbox requesting a management call-back, whereby a Fortinet support manager will contact you within 10 business days of your request

The Customer Satisfaction Survey is our tool for obtaining your feedback. You can be assured that the information collected is shared on a weekly basis with all levels of support management, including our executives, and is a key tool for driving improvements within our global support and service organization.

## Tracking Hardware and Software Life Cycles

To ensure we provide innovative solutions to customers, products are periodically discontinued. When this occurs for hardware products, a public communication including a transition plan is made available. The appliance then enters the end-of-life phase, during which it is possible to purchase up to 60 months of technical support services.

For firmware, the life cycle is 36 months from the release date of the minor or major software. Specific firmware versions Fortinet may designate them as Long Term Software (LTS) release, which extends the life cycle based on the purchase and registration of specific support service contracts.

All information regarding end-of-life announcements is stored in the Support Portal together with the Hardware and Software Life Cycle Policy. It is recommended that all Customers ensure they are familiar with the process.

Access to the Product Life Cycle information is available after login to the Support Portal at: <https://support.fortinet.com/Information/ProductLifeCycle.aspx>



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