

SUPPORT HANDBOOK

# FortiCompanion to Technical Support



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## Introduction

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

The aim of the FortiCompanion handbook is to provide you with the information to understand and make the 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, refer to the [Fortinet Service Terms and 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 enable us to ensure that our product experts focus on debugging and solving the most complex 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 of their support solution.

To facilitate the 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, and 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 various formats to assist in deploying and maintaining your Fortinet products. The following technical sites have RSS feeds available to stay updated 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, including admin guides, reference manuals, release notes, hardware manuals, QuickStart 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 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 Service team, which provides call center services and intelligent routing of incoming service requests. The Global Technical Assistance Centers deliver technical support to their regional customers and 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 free learn-as-you-go, tailored videos provide information for 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 publications. 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 Software 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 is generally available every three years
- **Minor Release: 7.2.x**  
Contains minor changes to functionality and is generally available every 12 months
- **Patch Release: 7.2.2**  
Contains bug fixes to customer-reported problems and are generally available on a rolling four- to eight-week window depending on the product

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

Fortinet provides details on new features, bug fixes, and upgrade instructions in the Release Notes associated with all new versions and patches to assist you through the process. You must consult this documentation as part of your change control program.

Access to firmware images is available after login to the Support Portal using the software and firmware [Download Center](#).

FortiOS requires that an active FortiCare contract entitlement is in place to upgrade firmware to a higher major or minor release. Without a registered active contract, the system will block the upgrade with the exception of a patch release to allow for security updates.

## 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, technical support requests must be raised through online channels.

### Contacting Technical Support

- Use our global toll-free numbers to contact our support teams: <https://www.fortinet.com/support/contact>
- Webchat provides a mechanism to obtain quick answers to technical questions or requests for information. Webchat 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 and 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
<b>Priority 1</b>	<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 on mission-critical functionality</li> <li>▪ An outage impacting multiple active user sessions or critical traffic</li> <li>▪ A significant loss of connectivity</li> <li>▪ A vital security flaw affecting active business services</li> </ul> <p>The customer and Fortinet commit to dedicate technical resources 24 hours a day, seven 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>
<b>Priority 2</b>	<p>A technical ticket created for an issue that causes significant impact on 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 eight hours a day, seven 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>
<b>Priority 3</b>	<p>Any technical ticket created for an issue in the customer network that has minimal impact on 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>
<b>Priority 4</b>	<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 Technical Assistance Center (TAC) for customer service assistance 24x7x365, 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 to facilitate ticket resolution. To troubleshoot complex incidents, our support teams must fully understand the network topology and role of the Fortinet device(s). Providing device configuration and all available log files provides a good starting point for investigating your issue and, therefore should be attached to all new support tickets. Refer to this Knowledge Base article for examples of information to provide per product family.

## Ticket Handlings SLAs

The FortiCare Service contracts include SLAs based on the service level purchased to ensure communication for a timely initial response and transparency during the ticket resolution process.

- The Initial Response Time is the 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 (FortiGate only)	ELITE (ETAC)
<b>Initial Response Time</b>	P1: n/a P2: n/a P3: Next Business Day P4: Next 2 Business Days	P1: 1 Hour P2: 1 Hour P3: Next Business Day P4: Next 2 Business Days	P1: 15 Mins P2: 15 Mins P3: 2 Business Hours P4: 4 Business Hours	P1: 15 Mins P2: 15 Mins P3: 4 Business Hours P4: Next Business Day
<b>Update Frequency Interval</b>	P1: n/a P2: n/a P3: 3 Business Days P4: 5 Business Days	P1: 6 Hours P2: Daily P3: 3 Business Days P4: 5 Business Days	P1: 3 Hours P2: 12 Hours P3: Each Business Day P4: Every 3 Business Days	P1: n/a P2: n/a P3: Next Business Day P4: Next 2 Business Days

## Ticket Progress

Once a ticket is created, you will receive a ticket number, and the incident will be assigned to a technical 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 in the [Support Portal](#).

Based on 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 and 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 these 10 days there is no response, the ticket will move to the status "Pending Close Confirmation" on the eleventh day, when an 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 can 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
<b>Registered</b>	A new ticket has been opened and is pending assignment. The action is with Fortinet.
<b>Researching</b>	The engineer is researching the technical data and will contact you to discuss their findings. The action is with Fortinet.
<b>PendCustFB</b>	The TAC has requested additional information to continue the analysis and is awaiting feedback. The action is with the customer.
<b>RcvdCustFB</b>	This is set automatically whenever you update the ticket. The action is with Fortinet.
<b>On Hold</b>	You have agreed with the TAC to suspend the ticket resolution process temporarily. 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.
<b>PendCloseConf</b>	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.
<b>PendBugFix</b>	A bug fix request has been submitted to engineering and a bug number (bug ID) communicated.
<b>WaitGARelease</b>	A bug fix has been created by engineering and is awaiting incorporation into the next General Availability (GA) release.
<b>Resolved-PendGA</b>	A patch has been provided. The ticket will remain open until this change has been incorporated into the next GA release.
<b>Solution Provided</b>	A solution was provided, and we are awaiting your confirmation to close the ticket.
<b>Closed</b>	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 the customer. 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.

<b>P4 → P3</b>	Either telephone or update the ticket in the Support Portal indicating the new business impact
<b>P3 → P2</b> <b>P2 → P1</b>	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.



## Escalating to TAC Management

Before considering an escalation, ensure that you have all the prerequisite items in place to support your request and 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 is required immediately for P1 incidents.

Once the escalation conditions have been met and checklist items validated, you should telephone the Technical Support Center to ensure you have the relevant ticket number. 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. Note that requesting an escalation will ensure a focus of your ticket, but may preclude an accelerated resolution time depending on the issue's complexity, nor does it imply that the ticket's priority will be automatically increased.

As required, a technical plan of action will be co-developed to resolve the technical issue. The assigned manager will update you and any other internal stakeholders, including your account team and upper management, on 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

We aim to provide best-in-class support services. As a result, our customer's opinion matters. 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 relates to 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 Survey" menu option. The survey is automatically sent with each ticket update and upon ticket closure.

In addition to the two ratings described above, there are two further options:

- Free-format field to provide any 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 every week with all levels of support management, including our executives, and is a vital 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. Fortinet may designate specific firmware versions as a Long Term Software (LTS) release, which extends the lifecycle 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. We recommend that all customers ensure they are familiar with the process.

Information about product life cycles is available through [an article on our Support Portal](#).

