CUSTOMER SUPPORT HANDBOOK

A Guidebook for MarkLogic Maintenance and Support Services

April 2019

TABLE OF CONTENTS

Information in this document and MarkLogic Technical Support policies are subject to change without notice.

HOW TO CONTACT US

Once registered as a support contact, you can contact MarkLogic Technical Support via:

- Email – support@marklogic.com
- Web – https://help.marklogic.com
- Phone – 1-855-882-8323

We recommend that all support requests be submitted via either email or web, to enhance the process of reporting, tracking and resolving issues.

Support requests for **urgent** issues (as defined in Understanding Case Priority and Response Time Targets) should be submitted at any time via email to urgent@marklogic.com.

SUPPORT PLAN FEATURES

Customers with an active maintenance contract are entitled to MarkLogic Support Services. The base level for all MarkLogic Support Services consists of:

- Major, minor, maintenance and patch releases;
- Hotfixes for critical, high impact, production issues;
- Technical Support Services and Resources;
- Product Documentation updates;
- Knowledge Base;
- Bug fix information.

Software Updates

MarkLogic generally makes software updates available for licensed installations to its supported customers at no additional license fee, provided its customers have an active maintenance contract. Updates do not include any release, option, or future software that MarkLogic licenses separately.

The [MarkLogic Support Portal](#) lists the most recent available service release for each major software version. Customer support contacts are notified when significant updates become available.

MarkLogic will provide download information, but its customers are responsible for downloading and installing the updates.

Technical Support

Technical Support consists of assistance with unlimited support requests and includes 24 x 7 technical support for **urgent** issues (as defined in [Understanding Case Priority and Response Time Targets](#)), or during standard business hours for all other issues. Standard business hours are 9 a.m. to 5 p.m. in the customer's local time zone.

MarkLogic Support Services does not include support directly to end users or customers of our customers or any other third party.

On-Site Support

Installation services and additional engineering or technical services, such as on-site trouble-shooting, configuration, integration and deployment of the software, are available under a separately agreed consulting agreement. To contact MarkLogic Professional Services, email consulting@marklogic.com.

Support Introduction

A support introduction session is available to all customers upon request. The support introduction normally consists of an interactive webex session with a member of the MarkLogic support leadership team in order to familiarize our customers with MarkLogic Technical Support and how best to work with us. The review normally lasts around 30 minutes.

To request an introduction session, email account-requests@marklogic.com.

HOW TO RECEIVE SUPPORT SERVICES

As a customer, you can receive MarkLogic Technical Support Services as soon as:

- The MarkLogic software products are properly licensed by you and you have a valid maintenance contract with MarkLogic, and
- You have registered with MarkLogic support.

Support services are provided for issues (including problems created by you) that are demonstrable or reproducible in the currently supported release(s) of a MarkLogic licensed product, running unaltered in a supported configuration.

A supported configuration is a configuration of hardware, operating system, and additional integrated software components (e.g. monitoring tools, BI tools, etc.) that are described as supported in the product documentation, available at http://docs.marklogic.com.

If you are not running a supported configuration, you may be asked to migrate to a supported configuration as part of incident isolation or resolution.

Registering With MarkLogic Support

Customer Support Contact

The role of the customer support contact is

- To serve as the first level of support for your organization, and
- To contact MarkLogic Technical Support Services in case of a technical problem.

Unless your contract with MarkLogic provides otherwise, you can designate five support contacts within your organization.

It is recommended that you register your organization's MarkLogic support contacts as soon as you have an active maintenance contract in place and before you need our services. Doing so will allow you to

- avoid any delays when you need MarkLogic Technical Support services,
- receive notifications (such as availability of significant releases), and
- have **full** access to the MarkLogic support portal at https://help.marklogic.com which provides access to MarkLogic Technical Support resources

Registering your Customer Support Contacts

The MarkLogic support portal includes a "Request Account" link to the most up to date account request instructions.

Typically, to register your organizations support contacts, you will send an email to account-requests@marklogic.com with the following information –

- **company/organization name** and
- One of either
    - **Your Customer Number**,
    - **Your Sales Order Number**, or
    - **A License key and Licensee** from a MarkLogic Server instance for which a maintenance contract exists**;**
- For each contact, include
    - **contact name,**
    - **email address,**
    - **telephone number** and
    - **work address**

- [1]*AWS Marketplace customers must also provide their* **AWS account number**.
- **Azure** cloud customers must provide their Azure account number.

MarkLogic on the Cloud

MarkLogic's commitment to support customers running MarkLogic Server on cloud infrastructure continues.

AWS

MarkLogic supports AWS customers who have an active Support Agreements with MarkLogic. Technical support is included with your Annual Subscription or Maintenance Agreements.

The following conditions must be in place in order to register a support contact with MarkLogic Technical Support:

- AWS Marketplace customers must provide their AWS account number;
- AWS Marketplace customers must either have an active maintenance agreement or have an annual subscription agreement in place in order to be entitled to MarkLogic Technical Support services;
- AWS Marketplace customers must have Business level support or higher with AWS

Azure

Beginning with MarkLogic 9, MarkLogic supports Customers running on the Azure environment with Active Support Agreements with MarkLogic. Support is included with your Annual Subscription or Maintenance Agreement

The following conditions must be in place in order to register a support contact with MarkLogic Technical Support:

- Azure customers must provide their Azure account number
- Azure customers must either have an active maintenance agreement or have an annual subscription agreement in place in order to entitled to MarkLogic Technical Support services.
- Azure customers must have Standard Level Support or higher with Azure

Self Managed Customer Support Contacts

The current implementation of the MarkLogic support portal has a feature that allows one individual from an organization to manage their organization's customer support contacts. This role allows that individual to create and delete MarkLogic Support Contacts for their organization without having to submit a request to MarkLogic. Support Contacts are transferable, so you can add and remove support contacts as needed in order to stay within your entitlements.

What to do Prior to Logging a Service Request

Before contacting MarkLogic Support, please follow the general checklist provided below:

☐ Ensure that you have been registered as a customer support contact. See Registering With MarkLogic Support
☐ Ensure that your support contact has been sufficiently trained on MarkLogic Server so that he/she can effectively communicate and work through the technical issues of a support incident. [As of this writing, **MarkLogic Server training is FREE!** You can find additional information

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[1] AWS Marketplace customers must have an annual subscription agreement in place in order to entitled to MarkLogic technical support services.

       regarding MarkLogic Server Training and Tutorials on our developer webpage
at http://developer.marklogic.com/learn.]
- ☐ Review the *product documentation* available at http://docs.marklogic.com, and the *knowledge base* available at https://help.marklogic.com.
- ☐ Ensure that you have a supported system configuration.
- ☐ Ensure that the MarkLogic Cluster you are requesting support for is licenced and entitled to MarkLogic Technical Support;
  - o All nodes in a cluster must be under an active maintenance contract for the features being used.
- ☐ Document all pertinent information regarding your deployment:
  - o Product name and version
  - o Hardware and operating system
  - o Cluster ID (if MarkLogic 9 Telemetry feature is enabled)
- ☐ Prepare a clear description of the problem (including error messages, and the circumstances under which problem occurred, including the events and actions leading up to the problem)
- ☐ If applicable, prepare a reproducible test case.

Opt-in Telemetry

Telemetry is an opt-in feature that enables more proactive support by sending diagnostic information so then MarkLogic Technical Support team can respond to your requests better and faster.

Working with Support

Working with MarkLogic Support is a Collaborative effort between both MarkLogic and our customers as the MarkLogic team are experts in MarkLogic's products, while our customers are experts in the application running on top of MarkLogic Server, and the infrastructure on which MarkLogic Server runs.

When submitting a service request, your support contact should have a baseline understanding of the problem you are encountering and, where applicable, an ability to reproduce the problem in order to assist MarkLogic in diagnosing and triaging the problem.

When providing information for a Support request, you should only provide to MarkLogic information that is required to provide Support and which is cleared of confidential or other sensitive information. MarkLogic does not require Protected Health Information (PHI), Payment Card Industry (PCI) information, or Personally Identifiable Information (PII) to provide Services and you should not forward any of such types of information to MarkLogic in connection with a Support request. At all times, information provided to MarkLogic in the course of Support will be handled in accordance with the Privacy Policy available here: http://www.marklogic.com/privacy-policy/. Similarly, any information collected via telemetric functionality enabled by users of MarkLogic Server will be handled in accordance with the above-referenced Privacy Policy.

In order to help expedite the analysis of a problem reported in a support incident:

For all issues, provide

- A **clear description** of the problem that includes
  - o **Expected** behavior,
  - o **Actual** behavior,
  - o **Symptoms**
  - o Leading **events** and **actions**
- MarkLogic Server **Support dump** (this includes cluster configuration, server status, forest status, and (if requested) logs). A support dump can be generated from the MarkLogic Server Admin UI by navigating to → Config → Support tab;
- **MarkLogic Error Logs** (If large these may have been dropped from the support dump). Error logs can be zipped up from the file system, or downloaded through the Admin UI.

- **MarkLogic Access Logs.**

If it is a **performance** issue, we will also want

- **System resource statistics** / SAR data.
- **Metering data** if enabled.
- Is the issue **persistent** or **intermittent**?
- Description of the hardware or platform, cloud, virtual or bare metal, shared or local storage?
- OS type and version?
- Is there any additional software running on the server?
- Pstack Movie: There are existing pstack scripts that are helpful for performance related issues – The script takes pstack movies and collect system statistics. You can find a pstack movie script on our support site - https://help.marklogic.com/Knowledgebase/Article/View/6/0/creating-a-pstack-movie-for-support - you should have these on hand and available to execute when necessary.

If the issue is associated with a specific or set of **documents**, please provide them.

If there is a **reproducible test case**, Provide

- Steps to reproduce,
- Source code to reproduce, and
- Documents needed to reproduce

If you would like **a call back**, please explicitly state that within the support request. The default communication is via e-mail / support portal.

> *Note: When a support ticket status is set to **URGENT** (or an e-mail is sent to urgent@marklogic.com), every support engineer as well as engineering management receives a text message. The filing of an Urgent incident is a call to arms for MarkLogic. Although you may not see it, there will be background communication among the MarkLogic server development and technical support teams, often before the initial response to the ticket has been made. If you file an **urgent** support ticket, please be available to respond to additional calls for information. If the issue is resolved or is no longer urgent, please make a quick comment to the support ticket so that the engineering teams can resume their normal operations.*

Escalation Process

Our customers can request that a support incident be escalated in the support ticket itself. When an incident is escalated, a support manager is assigned and the incident receives visibility to the engineering leadership. When requesting an escalation of a support incident, please include the following with the request:

- The reason for escalating
- The business impact of the incident
- The specific action you are requesting (e.g. Hotfix, phone call with the customer, upgrade in priority, etc.)

Understanding Case Priority and Response Time Targets

You and your MarkLogic support engineer will work together to assign the appropriate priority level to your service request. The MarkLogic support engineer will classify your support need and the problem severity according to the following criteria:

Case Priority	Incident Severity	Target Response Time[2]	Work Commitment[3]
Urgent	A production system or major application in production is completely unavailable or seriously impacted with no reasonable workaround.	1 hour	24 x 7
High	A system or major application is impacted in a way that could cause significant business impact if not corrected promptly, and there is no reasonable workaround.	4 business hours	Business hours
Medium	A system or application is moderately impacted but is operating within acceptable service levels, or a reasonable workaround exists to keep the system operating within acceptable service levels.	1 business day	Business hours
Low	Non-critical issues, general questions, enhancement requests.	3 business days	Business hours

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[2] Response time is the time it takes to answer the initial contact on a service request and assign it to a qualified engineer. Response time is not a resolution goal and should not be interpreted as a guarantee of service.

[3] Work commitment is a commitment on the part of both MarkLogic and the customer to work the incident during the specified period until it is resolved.

TECHNICAL SUPPORT LIFE CYCLE

Product Release Numbering

MarkLogic uses a three-place numbering scheme to designate released versions of software. The format is VV.RR-MM, where V indicates the version, R indicates the release level, and MM indicates the maintenance level. An example would be Version 7.0-6 (abbreviated 7.0-6).

A major release indicates major enhancements to product functionality. A change in the VV number denotes a major release, e.g. 8.0-1.

A minor release is provided to introduce enhanced functionality on a smaller scale. A change in the RR number denotes a minor release, e.g. 4.2-1.

A service release is produced to roll out resolutions to a number of problems that have been identified in the product. A change in the MM numbering denotes a service release, e.g. 8.0-6.

Support Cycle

MarkLogic will provide Maintenance Support for a major release for a period of at least 36 months from the declared production date of the release.

Maintenance Support includes Software Updates as defined in *Customers with* an active maintenance contract are entitled to MarkLogic Support Services. The base level for all MarkLogic Support Services consists of:

- Major, minor, maintenance and patch releases;
- Hotfixes for critical, high impact, production issues;
- Technical Support Services and Resources;
- Product Documentation updates;
- Knowledge Base;
- Bug fix information.

Software Updates, above;

End of Life

In an effort to continuously enhance and improve our product offering, it may become necessary as a part of MarkLogic's product lifecycle to declare that a particular product or product configuration (e.g. a particular operating system release) is at the "end of life" stage and therefore, MarkLogic reserves the right to desupport that product or product configuration. End- of-Life Notices generally are available 12 months in advance of the desupport date.

Desupport Notices are provided to registered support contacts by e-mail. Desupport Notices contain desupport dates, information about availability of Maintenance Support, and information about migration paths for certain features.

For customers running versions of MarkLogic software prior to version 9, MarkLogic will not be in a position to issue new license keys for such versions after 12/31/2020.

CUSTOMER RESPONSIBILITIES

In order to make the most of MarkLogic software and of MarkLogic's support services, the customer should follow these guidelines:

- Provide supervision, control and management of the use of the software.
- Implement procedures for the protection of information;
- Implement backup procedures;
- Document and promptly report to MarkLogic any errors or malfunctions of the software, and freely provide MarkLogic with all relevant and requested information regarding such errors or malfunctions.
- Take all steps necessary to carry out procedures for the rectification of errors or malfunctions within a reasonable time after such procedures have been received from MarkLogic.
- Maintain a current backup copy of all software and data.
- Train your personnel in the use and application of the software and the equipment on which it is used.
- [4]Maintain current maintenance and support contracts for the non-MarkLogic components in your operating environment (for example: Operating System, Hardware, and 3rd Party software).

Should you not follow these guidelines, MarkLogic's ability to provide you with full and complete support will be impaired. In this situation, MarkLogic will use its good faith reasonable efforts to provide the services described in this handbook. MarkLogic will not be responsible for any loss of information or data while performing maintenance.

SUPPORT TERMS

MarkLogic Technical Support terms, fees and duration are determined by your existing maintenance contract with MarkLogic. Any terms specified in your contract supercede any guidelines set forth in this document and supercedes the standard support terms and conditions available at http://www.marklogic.com/support-terms.pdf.

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[4] AWS Marketplace customers need to have business level support or higher with AWS.