SophServ User Guide

How to access and use the SophServ portal; a guide for administrators, users and partners
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Section 1: Getting started

Getting started with SophServ

Before you start using SophServ to create and manage your cases, you would normally ensure that you have a nominated person in your organization who is set up as a company administrator, which allows them to create and manage SophServ users.

This section lists the steps you must follow to get started. Full details of how to perform these steps are given under the relevant headings in Section 2 of this document, “Creating and managing user accounts”.

1. Set up a company administrator for your organization. This person will, typically, be responsible for creating and managing additional users within your organization. To set up your account as a company administrator:
   a. Create a MySophos account
   b. Request access to SophServ
   
   This person should be set up with full company administrator rights, including to “Receive SophServ access requests”.

2. Additional new users need to create a MySophos account for themselves and then request access to SophServ.

3. As the company administrator you can now:
   a. Approve SophServ access requests for the team and apply permissions to each user.
   b. Set up a User Group if appropriate, and assign users to this.

4. Users should now have access to SophServ enabling them to create and manage cases, as described in Section 3 of this document “Creating and managing cases”.

Important: As company administrator for SophServ, you are responsible for ensuring that SophServ access permission is only granted to trusted employees and authorized contractors. The company administrator is also responsible for removing SophServ access permissions from individuals upon the termination of their employment or contract.

Additional information is available in the online help within SophServ.
Section 2: Creating and managing user accounts

Creating a MySophos account

1. To create a MySophos Account, visit www.sophos.com and select the icon of a person at the top of the home page.
2. The Welcome to MySophos window will open that will prompt you to “Register now”. When registering for a MySophos Account you will need to complete some information such as name and email address.

For more information on MySophos including a how to video and frequently asked questions please see KBA 111195 on the Sophos website.

Note: Your email address will become your MySophos username and it will become the log in name you will use to access SophServ (the Sophos on-line Support Portal). You will also need to create a password.

After you have created your MySophos Account, a confirmation email is sent to the email address you provided to verify that you want to proceed in creating the MySophos Account.

Follow the instructions in the email to verify your account. Once you have verified your MySophos Account you can request access to SophServ.
**Requesting access to SophServ**

1. To request access to the Sophos on-line Support Portal, SophServ, go to: [https://sophserv.sophos.com](https://sophserv.sophos.com)

2. Here you will be prompted to log in using your MySophos Account username (your email address) and your password (the one you created when requesting your MySophos Account). If you have not yet been approved to use SophServ, you will be prompted to request access by providing your contact information and company details.

Once you submit this, the information will be sent directly to Sophos Technical Support who will process your request within 48 hours.

When your request has been processed you will receive an email confirming your request and notifying you that you are now able to log into SophServ via the URL: [https://sophserv.sophos.com](https://sophserv.sophos.com)

**Approving SophServ access requests for your team**

As a SophServ company administrator you can approve or deny requests for members of your team to use SophServ. To assist your team to use SophServ, send them the URL to sign up for SophServ: [https://sophserv.sophos.com](https://sophserv.sophos.com)

Your team users will need to create a MySophos Account and will then be able to request access to SophServ. You will receive those requests and can follow the process below to set up your team within SophServ.

1. On the SophServ Home tab, select “Administration”
2. In the Administrator section of SophServ, select “Users”. You will now see current team members that are already approved to use SophServ. To view any user that is not currently an active user, but has requested access, select “show pending access requests”

3. After you select the person you want to approve or reject access to, you will be prompted to complete any information in the fields that are not populated.

4. Apply the appropriate “Permissions” to that user.
   - Users set up as "Company Administrator" have full control within SophServ. They are able to add and remove users for their company within SophServ. They can see every case for their company within SophServ. If “Receive SophServ access requests” is also selected with “Company Administrator” this person will receive any SophServ access requests from employees for their company.
   - Users set up as "Active" can only see cases they own within SophServ.
   - Users set up as "Active" and also set up to belong to a Group (under the "Groups" option in the left hand vertical menu bar) can view and action on any cases for other team members that are in that same group.
   - Users set up as "Company Group Administrator" can make changes to Groups they belong too by adding or removing members from those Groups.

5. After you have completed all the user information and user permissions, click “save and authorize” to grant access to the requestor.

Note: If you do not want to grant access to a user you can also select “reject user request” and if the end user does not belong to your company or you believe there is an error you can select “report to Sophos”.
Manually adding your team members to SophServ

1. On the “Home” tab, select “Administration” (or the third icon from the top).

2. Click the 'New User' icon and populate the fields with person’s contact information. Ensure the username matches the MySophos username (user’s email address) you wish to give access to.

3. Select the permissions that you want to apply to the user you are adding (see description of permissions in previous section). Click "add user"
Setting up User Groups

User groups can only be set up by users with Admin rights. Contacts allocated to a user group can see each other’s cases. This allows administrators to have teams of people share case information without giving out further administrative rights to others.

1. To set up a user group, on the “Home” tab, select “Administration” | “Groups”, then click “New Group”.
2. You are prompted to create a Group Name and description.
3. Click “Add”. The Group(s) you create will be added to your list of available Groups.
4. To populate the Group(s) click on the name of the Group you want to edit and a list of all your employees with current access to SophServ will be displayed.
5. From that list use the arrow icons to add or remove users to or from Groups. Members of a group can view and work on each other’s cases within the designated Group they belong to.
Setting up SophServ for you and your team

The first time you log in to SophServ you may not see cases in your “Open Cases” pane.

1. To gain access to all your open cases, and ensure they populate your “Open Cases” view, you may need to go to the “Cases” tab from your home page.
2. In the Case Management Options “View” field, select “All Cases” and click submit.
3. In the Cases Found panel (if you are set up as a SophServ Administrator) you will see a list of all the cases currently open for your Company. (Note that if you are only set up with Active User permissions, you will need to ask your Company SophServ Administrator to assign any open cases to you in order for them to show up in your case view.)
4. Click on a cases that you want to view. This case opens in the “Activities” window providing further details about the case. It also displays an “Edit” button, which allows you to change who the case is assigned to, if required.
5. When you select the “edit” option the “Change Case Owner” dialog opens. Here you are presented with a list of team members in your organization that have access to SophServ. **Note:** If the list is empty you will want to encourage your employees/team to sign up for SophServ so that you can assign them cases within SophServ. Alternatively, if you have SophServ Administrator privileges you can manually set your team up with access. (See “Manually Adding your Team to SophServ”).
6. If you change the “Case Owner” to yourself, the case will then appear on your SophServ Homepage in the “Open Cases” section. If you change the “Case Owner” to another team member the case will show up on their Home page.

7. Click “Submit Changes” to confirm.
Section 3: Creating and managing cases

Opening a new case in SophServ

Important information for partners:
As a Partner you can tag any case you open as applying to one of your customers or prospects. This allows you to search or filter these parameters in your “Cases” view. If you are opening a case for one of your current active end-user companies, a “Customer” field is displayed at the top of the window. When you begin typing their company name in the “Customer” field the system will automatically populate the drop-down menu with that company’s name. If you are opening a case for a prospect you can still apply the customer name to the case by manually typing in the complete company name.

1. To open a new case within SophServ select the “Cases” tab, and click “Open New Case”. A pop-up opens, where you can complete the information needed to create the new case.
2. For each field, select the relevant option from the dropdown list:

- ‘Product’ logged should be the product installed on the computer where you see or experience the issue. Use the secondary drop down field to specify the version.
- ‘Operating System’ the second of the two fields provides a secondary dropdown option for version/detail.
- ‘Requested priority’
  You are able to request a particular severity level for your case. This will be audited by the engineer taking your case to ensure the proper severity level is associated. To view Sophos severity level definitions click the red hyperlink next to the drop down menu:
  
<table>
<thead>
<tr>
<th>Severity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Severity</td>
<td>Low Severity is assigned to a question concerning the operation of a Sophos product, or a suggested change to a product or to the product documentation.</td>
</tr>
<tr>
<td>Medium Severity</td>
<td>Medium Severity is assigned to a Sophos product issue causing no loss, or only very minor loss in service. The impact is an inconvenience, which does not impede operation or customer business. All incidents initiated by email will be assigned Medium Severity in the first instance, except those of a Low Severity level, as defined above.</td>
</tr>
<tr>
<td>High Severity</td>
<td>High Severity is assigned to a Sophos product issue causing a significant loss of service, and where no acceptable workaround is available. The problem adversely impacts customer business, but operation can continue in a restricted fashion or be alternatively routed.</td>
</tr>
<tr>
<td>Critical Severity</td>
<td>Critical Severity is assigned to a Sophos product issue causing a complete loss of service. Work cannot continue at all and operation is mission-critical to the customer's business. No acceptable workaround to the problem exists.</td>
</tr>
</tbody>
</table>

- ‘Your reference number’ can be used to insert your own company’s help desk ticket number or a reference tag of your choosing. All cases will still be assigned a unique Sophos case number.
- 'Problem subject' please be as concise as possible, but indicate the chief issue, e.g. installation fails with error *********. Use the 'Problem summary' field for adding detail.
- In the 'Problem summary' field add additional information about the issue you are experiencing.
- Use the 'Attach files' field together with the 'Select' button, to attach any files that you think would help in providing information about your problem, such as log files etc. All attachments are scanned by SophosLabs, so there may be a delay before you see it attached to your case. Do not use this channel for submitting malware files, instead use the supplied link to the form for malware sample submissions.

3. Click “Submit Support Request”. You can now see the case you created in your “Open Cases” view on your home page or within the “Cases” view.
Updating or Closing a Case in SophServ

1. To update or close a case in SophServ, click on the “Cases” tab at the top of your SophServ screen.

2. Search your open cases to find the one you would like to update or close, and click on it.

3. The case is displayed in the “Activities” view. Select either “close this case” or “update case”.

   - If you select “close this case” you will be prompted to confirm that you want to close the case. You will then receive a pop up asking for details on why the case can be closed. Complete all required fields and provide a clear reason for closing the case (if the issue has been resolved by you please mention what you did). Then click ‘Submit’. This will close the case.

   - If you select the option to “update case” you will receive a pop up that will allow you to provide any new or pertinent information to Sophos Support on your case. Complete the relevant fields then click ‘Submit’. This will update the case details.

Setting up Alerts

SophServ allows you to set up and receive three types of alerts:

- Case Creation Alerts – this will send you an email whenever someone opens a new case within your SophServ Portal. If you are Partner this will also alert you if one of your customers who has approved to share cases with you, opens a case.

- Sophos Email Alerts – this will send you technical email alerts such as product retirement information.
• Sophos SMS Emergency Alerts – this will send you emergency information only about Sophos issues that may impact the performance of your Sophos solutions.

1. To set up alerts click on the “Profile” option from the home page, or the blue gear icon in the left hand vertical menu bar.

2. In your Profile Preferences select the Alerts you would like to receive. You can also test the SMS alert system to ensure that it works with your mobile service provider. Note: to receive SMS alerts you must have a valid mobile number saved in the proper format within your Profile.

Creating a Watchlist

A Watchlist can be used to quickly look at important cases in one view.

1. To populate your Watchlist, on the “Cases” tab, select and open a case that you would like to watch.

2. On the right hand side, select the check box “Watch this case”. This will add the case to your “Watchlist” tab.
3. On the Watchlist tab, click the double chevron \textgreater\textgreater (next to Case ID), to open your Watchlist queue options. From the drop-down you can select the “Modified” option to see when your Watched cases were last updated. To stop watching a case, in the Activities window, deselect the “Watch this case” option.
Setting queue view preferences

SophServ allows each portal user to select what they would like to see in the case view area.

1. To select the details you would like to sort and view cases by, navigate to the “Cases” tab and then click on the double chevron located at the top left of the “Cases” window.

2. From the dropdown select which options you want to filter your case view by.

3. You can also click the case view headings to filter cases in the main view.
Giving a Partner access to view cases

You can configure SophServ to allow Partners from whom you have purchased Sophos products, to view your open technical support cases.

1. To allow a Partner to view cases you have created, on the Home page, select the “Administration” option (on the left hand vertical menu bar), then choose “Partners”. You may see multiple Partner names if you have purchased Sophos licenses from different Sophos Partners or Resellers.

2. You will need to agree to the legal disclaimer at the top of the page if you wish to grant rights for one or more of your Partners to view your support cases with Sophos. If you agree to the disclaimer, tick the “I agree” box. This enables the arrow selection buttons, which allow you to move Partners between the “Hide Cases” and “View Cases” options. You can select all Partners to view cases or just individual Partners.

3. To give a Partner permission to view cases, use the arrow selection buttons to move them to the “View Cases” pane.

To remove permission for a Partner to view your cases

1. To remove permission for a Partner to view your cases, on the Home page, select “Administration” | “Partners”.

2. Move the Partner from the “View cases” to “Hide Cases”.

Note: To prevent all sharing of your cases by partners, deselect the “I agree” box.
Viewing your customers’ cases (for Partners)

If you are a Sophos Partner, and one or more of your customers has given you access to view their cases, go to the “Cases” tab, and select the option “Group by Customer”.

![Checkbox for Group By Company]
Viewing and booking Remote Hourly Consulting

If you have purchased Remote Hourly Consulting hours, or have been granted them through the purchase of Premium or Platinum Support, you can view the hours in the “Services” section of SophServ. **Note:** only Remote Hourly Consulting can be viewed in SophServ. If you have purchased on-site or remote Professional Services you will need to speak to your Sophos Account Manager to book those services.

1. To book your consulting hours, select “Book Service Package” from the left hand menu.

2. In the “Choose a Package” view, select the package you would like to book. Read the details displayed at the bottom entitled “Package Summary” before selecting “next”.

![Services Summary](image)
3. Click “next” to open the “Engagement Form”. When completing this form, ensure that you use the scroll bar on the right to obtain all the pre-engagement questions. The more detail you place in this form the more valuable your time with the Consulting Engineer will be.

After you have completed the “Engagement Form” click “next” to continue through the wizard.

4. Once you have selected the date and time that you want your engagement performed on, the “Contact Information” window will open where you will need to provide name and contact details for the person at your company that the Sophos Consulting Engineer will contact.

**Important:** if the Sophos Consulting Engineer cannot get a hold of the person you allocate in the Contact Information section at the date and time of the Engagement, then the hours booked will be forfeit.

5. The last step of the process is to review the contact information and engagement details. You will then be presented the Terms and Conditions to read. If you agree to these, check the “I accept the Sophos Professional Services Standard Terms & Conditions” box.

6. Click “Propose Engagement”.

Once you have finished this process and proposed the engagement, an engineer will review the request within one business day to ensure that it has been booked properly. At this point the engagement will either be approved or denied, and you will receive a notification indicating the status of the engagement.
(Approved or Denied). In the event that the engagement is denied, the notification will indicate the reason that the engagement was denied and you will have an opportunity to re-book appropriately.

**Generating reports**

SophServ allows you to generate reports on Support usage, and case statistics.

On the Home tab, click on the “Reporting” option (or the pie graph icon 2nd from the top) on the left hand vertical menu bar.

Select Case Type (If you select open cases there will be no time range option presented). | Time Range | Generate.
Section 4: Using SophServ to access the Sophos knowledgebase

Additional articles available in SophServ

Important information for partners:

SophServ provides access to the full set of published knowledgebase articles. In addition, SophServ supplies an additional set of partner-only articles. Therefore we recommend you use SophServ for knowledgebase searching when possible.

This additional set of articles is only available to partners and the information contained is generally not designed for direct customer usage. The information is aimed at advanced users with more understanding of operating systems and software behavior. Therefore these articles may not contain full procedures with all warnings and/or recommendations.

You can identify partner articles from the search and browse list by the article’s icon:

Note: Partner articles which have not been through the full validation cycle will display a warning caveat image above the main body of the article.

Browsing knowledgebase articles by topic

To browse knowledgebase articles in SophServ:

1. Click on the “Articles” tab.
2. From the left-hand panel select the desired topic.

Articles for the selected topic are displayed in the main right panel.

Note:
- The number of articles available in each topic is shown against the topic name.
- Articles are displayed in date order with the most recently updated articles at the top.
- Many topics have child topics. All articles for the current topic and child topics are displayed. Select any child topic to refine the list of articles displayed.
- 25 articles are displayed per page with navigation arrows at the bottom of the page.

Searching the knowledgebase

To search the knowledgebase use the main search field which is available from all pages in SophServ.

Providing feedback on articles

If you use an article and then provide feedback on it we are able to improve the information available in our knowledgebase. You can provide feedback on an article by using the form at the bottom of every article.
All feedback provided is read and where the feedback clearly explains a problem/improvement we endeavor to act on it as quickly as possible.