



# CUSTOMER SUPPORT HANDBOOK

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*A Guidebook for MarkLogic Maintenance and Technical Support Services*

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

## Registering With MarkLogic Technical Support

MarkLogic Technical Support Services are available to customers with active services in MarkLogic Data Hub Service and to licensed MarkLogic Server customers with active maintenance agreements. In order to engage the MarkLogic Technical Support team, you must be a registered MarkLogic support contact.

### Customer Support Contact

The role of the MarkLogic 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.

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

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

### Registering your Customer Support Contacts

The [MarkLogic support portal](https://help.marklogic.com) includes a "[Request Account](#)" link to an account request form.

To register your organizations support contacts, you will need to provide

- **name,**
- **email address,**
- **company/organization name** and
- Proof of Entitlement - One of either
  - (Data Hub Service customers) **MarkLogic Service Account ID**; or
  - (MarkLogic Server customers) **A License key and Licensee** from a MarkLogic Server instance for which a maintenance contract exists; or
  - **MarkLogic Sales Order Number**; or
  - **MarkLogic Customer Number**; or
  - (**AWS Marketplace customers**) **AWS account number**; or
  - (**Azure cloud customers**) **Azure account number**.

### Data Hub Service

The MarkLogic Technical Support team will provide technical support to all of our Data Hub Service customers who have an active Data Hub Service instance.

### MarkLogic Server on AWS

MarkLogic supports AWS customers who have an active support agreement with MarkLogic. Technical support services are 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:

- 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

## MarkLogic Server on Azure

MarkLogic supports customers running on the Azure environment with an active support agreement with MarkLogic. Technical support services are 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 either have an active maintenance agreement or have an annual subscription agreement in place in order to be entitled to MarkLogic Technical Support services.
- Azure customers must have Standard Level Support or higher with Azure.

## Self Managed Customer Support Contacts

The [MarkLogic support portal](#) allows one individual from each organization to manage their organization's MarkLogic customer support contacts. That individual can create and delete MarkLogic Support Contacts for their organization without having to submit a request to MarkLogic. Support Contacts are transferable - support contacts can be added and removed as needed within the organizations entitlements.

## HOW TO CONTACT US

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

- Web Support portal at <https://help.marklogic.com>;
- Email
  - For Data Hub Service issues, send email to [cloud-support@marklogic.com](mailto:cloud-support@marklogic.com);
  - For all other issues, send email to [support@marklogic.com](mailto:support@marklogic.com).
- Phone – 1-855-882-8323

To enhance the process of reporting, tracking and resolving issues, we recommend that all support requests be submitted via the web portal or via email.

Support requests for **urgent** issues (as defined in [Understanding Case Priority and Response Time Targets](#)) can be submitted at any time via [our support portal](#) or via email to [urgent@marklogic.com](mailto:urgent@marklogic.com).

## SUPPORT PLAN FEATURES

The base level of services available to all customers entitled to MarkLogic Technical Support Services consists of:

- Product updates and bug fixes;
- Technical support services and resources;
- Unlimited incident submissions to engage the MarkLogic Technical Support Engineering team;
- Product documentation updates;
- Knowledge base;

### MarkLogic Server Software Updates

MarkLogic generally makes product 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.

For MarkLogic software products installed on customer managed infrastructure, MarkLogic will provide download information. It is our customers responsibility to download and install the updates at a time that meets their operational needs.

### Data Hub Service Updates

#### Minor Version Upgrades

MarkLogic may automatically upgrade minor versions of the Data Hub as they become required by the service. MarkLogic will notify the users ahead of the upgrades and perform the upgrades during the next scheduled maintenance window. Upgrades may be Mandatory or Scheduled. If Mandatory, the upgrade will be applied at the next maintenance window. If Scheduled, the upgrade can be deferred. Scheduled upgrades can be deferred for up to 21 days after which they become Mandatory.

#### Major Version Upgrade

MarkLogic will make major version upgrades of Data Hub available as they become supported by the service. MarkLogic will notify the users about the availability of new version and allow the user to request a major upgrade. Major upgrades can cause minor downtime during the upgrade process.

Additional details are available in our [Service Update Policy](#).

### 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 troubleshooting, configuration, integration and deployment of the software, are available under a separately agreed consulting agreement. To contact MarkLogic Professional Services, email [consulting@marklogic.com](mailto:consulting@marklogic.com).

## Support Introduction

A support introduction session is available to all customers upon request. The session consists of an interactive web video session with a member of the MarkLogic Technical Support leadership team in order to familiarize our customers with MarkLogic Technical Support Services and how best to work with us.

## HOW TO RECEIVE SUPPORT SERVICES

As a customer, you can receive MarkLogic Technical Support Services as soon as you are [registered with MarkLogic Technical 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.

### 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 products 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 regarding MarkLogic Server Training and Tutorials on our developer webpage at <http://developer.marklogic.com/learn>.]
- Review the *product documentation* available at (MarkLogic Server) <http://docs.marklogic.com> and (Data Hub Service) <https://docs.marklogic.com/cloudservices/>,
- Search our *knowledge base* available at <https://help.marklogic.com>.
- Ensure that you have a supported system configuration.
- Ensure that the MarkLogic product you are requesting support for is entitled to MarkLogic Technical Support;
- Document all pertinent information regarding your deployment:
  - Product name and version
  - Infrastructure description
    - Hardware or instance type;
    - Operating system; and/or
    - Cloud Service provider;
    - Etc.
  - (MarkLogic Server only) Cluster ID (if MarkLogic Telemetry feature is enabled)
  - (Data Hub Service only) MarkLogic Service Account ID and Service Instance ID;
- 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 MarkLogic Server feature that enables more proactive support by sending diagnostic information so that the MarkLogic Technical Support team can respond to your requests better and faster.

### Working with MarkLogic

Working with MarkLogic Technical Support is a **collaborative** effort between both MarkLogic and our customers as the MarkLogic engineering teams are experts in MarkLogic's products and services, while our customers are experts in their application and other layers of their solution stack.

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

*When providing information to MarkLogic for a Support request, you should only provide information that is required by MarkLogic for diagnostic purposes 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.*

### Service Request Details

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
  - **Expected** behavior,
  - **Actual** behavior,
  - **Symptoms**,
  - Leading **events** and **actions**,
  - **Timeline** of events and actions.

For issues involving MarkLogic Server, provide

- 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**.
- Description of the hardware or platform, cloud, virtual or bare metal, shared or local storage?
- OS type and version?
- If it is a **performance** issue, we will also want
  - **System resource statistics** / SAR data.
  - **Metering data** if enabled.
- (upon request) 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

For issues involving Data Hub Service, provide

- **MarkLogic Service Account ID**: The identifier for your DHS account. *Example:* 123456789876
- **Service ID**: The identifier for your service instance. *Example:* mlaas-1234abcd-12ab-12ab-12ab-123456abcdef
- Cloud Service provider (i.e. AWS or Azure).
- DHS version

For **Performance** issue:



- Is the issue **persistent** or **intermittent**?
- Is there any additional software running on the server?

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](mailto: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 development and technical support teams, often before the initial response to the ticket has been made.*

*If you file an **urgent** support ticket,*

- *You must be available to respond to additional calls for information.*
- *Requires 24/7 work commitment from both customer and MarkLogic Technical Support.*
- *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.*

## Submitting a ticket through our Support Portal

To submit a support ticket through our web portal at <https://help.marklogic.com/>

1. Login
2. Click the “New Ticket” link
3. Fill in the forms as prompted  
**Note:** For quickest response, please provide all information you are prompted to enter.
4. Submit the form

### Example: Submitting a ticket for a Data Hub Service issue

When filling in the new ticket form, please provide.

1. In the **General Information** section,
  - **Departments:** Cloud Services
  - **Priority:** Set as appropriate. (Refer to [the “Understanding Case Priority ...” section](#) below for details regarding the priority setting)
2. In the **Metadata** section,
  - **MarkLogic Service ID:** The identifier for your DHS account. Example: 123456789876
  - **Service ID:** The identifier for your service. Example: mlaas-1234abcd-12ab-12ab-12ab-123456abcdef
  - **Environment:** Is the system being used for Development, Production, or Test?
  - **Platform:** Is this DHS instance on AWS or Azure?
  - **DHS Version:** Select the DHS versions for the instance to which your problem applies.
3. In the **Your Message** section,
  - Provide a detailed message about your problem. (Refer to the [“Service Request Details” section](#) above for a discussion regarding the type of detail to include)
4. (Optional) You can:
  - Specify Additional recipients to be copied on the ticket communication; and
  - Attach files that may be important for the incident investigation and analysis. (Refer to the data privacy statement in [the “Working with MarkLogic” section](#) above).
5. Click **Submit**.

## 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., phone call with the customer, upgrade in priority, hotfix, etc.)

## Understanding Case Priority and Response Time Targets

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

Case Priority	Incident Severity	Target Response Time <sup>3</sup>	Work Commitment <sup>4</sup>
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

<sup>3</sup> 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.

<sup>4</sup> 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.

## CUSTOMER RESPONSIBILITIES

### Operational Guidelines

In order to make the most of MarkLogic products and of MarkLogic's Technical Support Services, the customer should follow these guidelines:

- Provide supervision, control and management of their use of the software or service.
- Implement procedures for the protection of information.
- Document and promptly report to MarkLogic any errors or malfunctions of the software or service, 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; *Note: [Database backup is handled automatically by the Data Hub Service](#);*
- Train your personnel in the use and application of the software and the equipment on which it is used.
- <sup>5</sup>Maintain current maintenance and support contracts for the non-MarkLogic components in your operating environment.

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 technical support.

### Custom Software and Custom Components

The customer is responsible for the maintenance of all software and infrastructure components in their solution stack that is not included in their supported MarkLogic products or services. This includes such things as

- Client Application software (even if provided by MarkLogic Professional Services),
- Third Party software,
- Open source software not Supported by the MarkLogic Product organization,
- MarkLogic Product configurations.
- Infrastructure deployment scripts,
- Infrastructure (OS, hardware, virtualization layers, ...)

### Incident Guidelines

Diagnosing incidents and issues is a **collaborative** effort between MarkLogic Technical Support and the customer.

The MarkLogic Technical Support team primarily assists with incidents and questions on the usage of MarkLogic products and services.

The MarkLogic Technical Support team does not engage in project work such as infrastructure sizing, data modelling, code reviews, and application or solution development. In those circumstances, the MarkLogic support team may refer our customers to our Professional Services organization.

The MarkLogic Technical Support team may provide code samples, but MarkLogic does not provide any warranty on any sample code created by MarkLogic technical support and given to the customer. The customer is responsible for modifying and verifying any such code before executing on their production environments.

If logged incident is resolved w/o Marklogic Technical Support assistance, please share discoveries that helped you resolve the incident along with the solution details. This will allow MarkLogic to better serve other customers who encounter similar incidents.

## TECHNICAL SUPPORT LIFE CYCLE

### MarkLogic Server

MarkLogic Server 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.

A major release indicates major enhancements to product functionality. A change in the VV number denotes a major release, e.g. 10.0-1.

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. 10.0-5.

MarkLogic will provide maintenance support for a major MarkLogic Server release for a period of at least 36 months from the declared production date of the release.

### Data Hub Service

For Data Hub Service customers, please refer to our [Service Update Policy](#).

### 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 discontinued support date.

Discontinued support notices are provided to registered support contacts by e-mail and will contain EOL dates, information about availability of maintenance support, and information about migration paths for certain features.

## SUPPORT TERMS

MarkLogic Technical Support terms, fees and duration are determined by your existing 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>.