

Support Handbook

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Overview

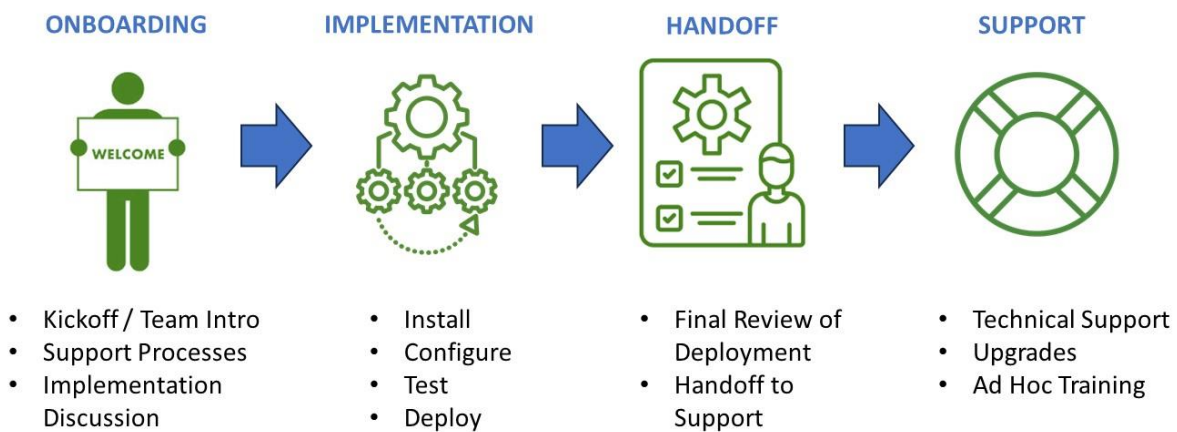
Thank you for selecting Trilio and welcome to the Trilio Customer Support Handbook. This handbook aims to provide the information you need to ensure a successful partnership between your organization and Trilio. We will outline Trilio's Customer Support processes and tools, clarifying how to utilize them effectively to maximize the return on your investment in Trilio solutions. While we always try to proactively answer the most anticipated questions for you, we remain eager to address any further inquiries or concerns not covered in this handbook.

Trilio Customer Support Mission Statement

We are committed to providing world-class support, services, and expertise to ensure our customers successfully utilize Trilio's solutions so that we may come to be regarded as a key business partner to our clients.

New Customer Transition Phases

The diagram below illustrates the phases you will go through from the time you purchase a Trilio product until you have finished the implementation. Following implementation, Trilio's Customer Support team becomes the single point of contact for any customer issues and/or inquiries. As needed, Support team members will diligently reach out to other organizations within Trilio to provide resolution to any issues that you may have raised.



Trilio Customer Support Organization

Trilio's Customer Support is your single point of contact following training and implementation and is committed to helping customers maximize productivity and minimize downtime.

Customers with an active product subscription or maintenance agreement may also obtain updates and enhancements. Several resources, such as technical documentation and Trilio's Customer Portal, are available to help you keep your Trilio solution running effectively. Our support organization is not a conventional call center with multiple, tiered levels of support, but rather a highly proficient team dedicated to delivering technical support and troubleshooting related to maintaining Trilio solutions. Technical issues, or "cases," are allocated to a Trilio Customer Support Engineer (CSE) who possesses specialized knowledge of your Trilio product.

Additional Trilio Resources

For customers requiring assistance outside of software support issues, such as additional training or further consulting, Trilio Customer Support will involve other departments that can provide help in different areas.

Professional Services

Trilio's Professional Services team aids in software implementations, upgrades, migrations, and reconfiguration assistance due to changes in requirements.

Sales

Trilio's Sales organization is always eager to assist in fulfilling requests for additional software and licenses. You may contact a sales representative by sending an email to your account executive or to sales@trilio.io.

Solution Architects

The Solution Architecture team provides expertise during the sales process. The team helps ensure that the appropriate information is captured and shared with other Trilio departments to facilitate a smooth deployment process.

Customer Support Terminology

The following table details commonly used terminology and their definitions:

Term	Definition
Case	The recorded technical issue or question submitted to Trilio Customer Support. A case captures and records the status and communications between your organization and Trilio, providing a history of your support experience. This case history ensures that essential information is retained and that the correct process is followed.
Case ID	The identifier used to track the status of communication between Trilio Customer Support and the customer.
Case Priority Levels	<p>Trilio uses Priority to determine your issue's level of criticality and identify the order in which cases get addressed. Customers can determine their own level of Priority following the guidelines below. Please note: If your request does not meet the Priority Level criteria as defined below, Support may re-classify it as appropriate. Issues are then worked according to severity.</p> <p>Priority 1 (P1) Defined as an issue that affects the customer's business continuity, hindering production and necessitating immediate assistance. An example of a critical case includes production workload(s) being deleted and subsequent restore attempts failing.</p> <p>Priority 2 (P2) Defined as an issue impacting a single user, resulting in work disruption, severe effects on end-user productivity, or substantial impact on production efforts. An example of a moderate case would be a backup failure for an individual workload while previous backups succeeded.</p> <p>Priority 3 (P3) Defined as a minor issue where a workaround is available, or there is a general inquiry about the product. In an ideal scenario, where the customer has effectively onboarded all team members with Trilio and consistently promoted our Customer Support Team as a valuable resource for questions related to all subscribed Trilio products, it is expected that most incoming requests will be assigned to this priority level.</p> <p>Priority 4 (P4) Defined as a proposed addition of a new feature to a product or enhancement for an existing feature's design. Feature/enhancement requests will be considered for potential future development</p>

Contact	A person or group representing a Trilio customer who has completed the onboarding process, received access credentials to the Trilio Customer Portal, and obtained the required permissions to create and review Trilio support cases.
CSE- Customer Support Engineer	The Customer Support Engineer (CSE) is the assigned technical expert who will manage your case to its resolution.
Customer Portal	<p>https://trilio.force.com/io/login</p> <p>The Trilio customer support portal provides access to the FAQ, product and technical documents, case tracking system, product downloads and more.</p>
Escalation	A way for a customer to request that a case receives additional attention from support management when a case is not resolved within your expected time frame.
Status	<p>Defines the case's current stage or condition. After a case is opened by you or by us on your behalf, its status will be one of the following:</p> <ul style="list-style-type: none"> • New Case – Case has been submitted by customer and is awaiting acceptance by Trilio CSE. • Accepted – Trilio CSE has accepted the case. • Working – Trilio CSE is actively working on the case. • Waiting for Response – Trilio CSE is waiting for a response from the customer (i.e., need logs, need verification of information, etc.). • In Trilio Engineering – Trilio CSE is working with Trilio Engineering for assistance (escalated). • Closed – Issue has been resolved.

Communicating with Trilio Customer Support

Customer Portal: <https://trilio.force.com/io/login>

Email: support@trilio.io

Trilio Customer Portal

Trilio recognizes the importance of making information available to our customers regardless of their location or the time of day. The Customer Portal (<https://trilio.force.com/io/login>) is intended to serve as a hub for product knowledge and customer support related inquiries. We are working on adding information to it at this time.

Gaining Access to the Customer Portal

Customers should encourage each team member to utilize the Trilio Customer Portal for any support-related inquiries. To receive access to the portal, please reach out to your Trilio Sales representative or have a member with existing access open a support case. Simply provide the first and last name, email address, and phone number to be associated with the new access credentials. After the request is fulfilled, a welcome email will be sent to the provided address with further details and login credentials.

Subscription, and Maintenance & Support Agreement

Renewing Your Product Subscription or Maintenance and Technical Support Agreement

The Subscription or Maintenance & Support Period shall automatically be extended for subsequent one (1) year periods unless the customer provides Trilio with written notice of its intent to terminate the subscription period at least sixty (60) days prior to the anticipated renewal date.

Trilio will issue an invoice at your renewal date and our support team will be notified that you have renewed your Subscription or Maintenance & Support agreement. For subscription products, the product cannot be used unless the subscription is renewed.

Support and Maintenance Period Defined

Maintenance for Supported Releases. During the Subscription or Maintenance Period, Trilio will maintain the current feature release* of our Software along with one prior release supporting customer's supported platform. The prior release's maintenance is available for up to six (6) months after the then-current release which supports Customer's use of Kubernetes or OpenStack platform. After the six (6) month period, only bug fixes will be available for the current release.

For clarification, Trilio will exclusively offer fixes and service packs for the Kubernetes or OpenStack vendor's fully maintained and supported standard releases. We will continue to offer comprehensive support to customers who are current on their subscription or annual maintenance and support contract, irrespective of the software version they are using. Such customers may initiate support cases, seek clarification, report defects and more. However, note that service packs for feature releases older than the aforementioned criteria will not be available. In case the Customer requires fixes, an upgrade to the current release will be necessary.

* A feature release is defined as any release that introduces new features, or support for new platforms.

Installs and Upgrades

Customers have two options regarding software installs and upgrades:

1. Utilize purchased blocks of service hours to schedule time with the Trilio Professional Services Team which will assist with the planned installation or upgrade of the Trilio product.

2. Conduct the installation or upgrade without Trilio's assistance. If the installation or upgrade fails due to any reason other than a software defect, Trilio will assist with the installation or upgrade after the customer signs an SOW (Statement of Work) covering the required blocks of service hours. The customer will not be charged for problems deemed to be related to software defects or errors in the installation process. Please utilize the customer portal for access to documentation and to open a case with customer support for any related questions you may have.

Reinstatement after a Lapse

If a product subscription has lapsed without renewal, customers should inquire about a new subscription by sending Trilio's Sales Team an email at sales@trilio.io. Purchases post-subscription lapse is subject to current Trilio terms, conditions and pricing unless otherwise agreed upon.

Unsupported Software Use

Trilio will not provide technical support for Trilio products where unauthorized modifications such as database changes, custom scripting, or any other alterations to core Trilio code have been made by anyone other than a current Trilio employee. Be advised that any such changes are made at your own risk and that Trilio cannot assume any liability for problems arising from said changes. If you have a business need for a change to Trilio's software, you should open a support case detailing an enhancement request.

The Customer Support Process

Reporting an Issue

Trilio Customer Portal is a great starting place to open a case. It is highly recommended that you use the information contained in our comprehensive documentation library which is available to all customers at docs.trilio.io.

If this does not satisfy your needs, please open a case with Customer Support describing the issue.

Submitting a Case Using the Customer Portal

<https://trilio.force.com/io/login>

Trilio provides customers with access to the Trilio Customer Portal. This self-help portal allows you to log and track cases online. The advantages of using self-serve case reporting are:

- Real-time case tracking
- Ability to dictate your case priority level

- Access to case info wherever and whenever
- Central repository to keep your case details organized

When you log a case using the Trilio Customer Portal, you can set your case priority and monitor its progress in real-time using an assigned case tracking number.

For simplicity, Trilio suggests your company designate a single email distribution to use for access to the Trilio Customer Portal. This email account will be used to access case lists, manage the overall case-tracking process, and ensure communication with all team members. When a case is submitted via the Trilio Customer Portal, you will automatically receive an assigned case ID tracking number via email. All case alerts will also be sent to the distribution email address. The case is then assigned to a Trilio CSE who is a technical expert trained on your specific Trilio product.

Troubleshooting and Diagnosis Phase

In the troubleshooting and diagnosis phase of a case, the CSE will first diagnose and triage the case based on the information that was provided. If additional information is required, the CSE will update the case with the request. All case updates will generate an email notification to the contact's specified address.

Trilio Support uses the following high-level approach when investigating an issue:

- Ask qualifying questions to further clarify the issue.
- Request error messages, logs, command-line output or screenshots that illustrate the issue.
- Determine repeatability of the issue – often, this is an iterative process.
- Request and schedule a virtual troubleshooting session.
- Escalate to Professional Services if the case is related to customizations and/or advanced usage of product features and functionality.
- Escalate to Engineering if a software defect exists that cannot be resolved by Support.

Cases Requiring Additional Information

When a CSE determines that additional information is required the information will be requested via the case. After the request is “active” and a case has been opened, the work status will change to “Waiting for Response” which means Trilio needs more information to be able to respond to your needs. If a response is not received within 14 days, the case will be closed. If there is a need to revisit the issue reported in the closed case with an update or added information, the customer has the option to reopen the case from the customer portal or open a new case as they determine is appropriate.

Case Response Time and Escalation

The table below details the priority levels, initial response times, and escalation thresholds for each issue reported to Customer Support during normal business hours. Customers may request direct case escalation, as they see fit, to the Customer Support Management Team when a workaround is not available, and the issue has caused a critical work stoppage.

Priority	Initial Response Time	Escalation Threshold
P1	Within 4 Hours	If case escalation does not lead to a solution within 5 Business Days, case is escalated to Customer Support management.
P2	Within 8 Hours	If resolution or workaround not achieved within 10 Business Days, case is escalated to Customer Support Manager.
P3	Within 24 Hours	No escalation.
P4	Reviewed as part of annual product planning.	No Escalation.

Case Resolution Process

While Trilio Support guarantees response times there is no guaranteed resolution time. During the initial case review, the Customer Support Engineer (CSE) will examine any provided details, logs, error messages and screenshots to help determine the cause and recommend a resolution or workaround if applicable. Cases should contain all details relevant to the issue and logs should contain relevant timestamps to ensure the best possible results.

If a resolution to a P1 or P2 case cannot be made during the initial case review, it is escalated to Engineering. The CSE remains the main point of contact for the customer until a resolution is achieved. The CSE will also follow up with the customer to ensure that the issue was completely resolved to the customer's satisfaction before it is closed. This resolution is then entered into the case notes and the case is closed. If the customer does not respond to the CSE's follow-up inquiry within 14 days, Trilio will assume the resolution is satisfactory and will close the case with a closing comment. The customer has the option to reopen the case should they need to revisit the issue.

Resources

Customer Support Portal: trilio.force.com/io/login

Documentation Library: docs.trilio.io

Blogs: trilio.io/blog/

Videos: trilio.io/video-demo/

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