



IBM Trusteer Support

Handbook

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Contents

| | |
|--------------------------------------------------------|----------|
| Notices | i |
| Copyright License | ii |
| Trademarks | ii |
| Privacy Policy Considerations | iii |
| 1. Front Matter | 1 |
| About this Publication | 1 |
| Support Information | 1 |
| Accessibility | 1 |
| Statement of Good Security Practices | 2 |
| 2. IBM Trusteer Support | 3 |
| Overview | 3 |
| Availability | 4 |
| Communication Channels | 4 |
| <i>Email – for End-users</i> | 4 |
| <i>Email – for Enterprise</i> | 4 |
| <i>Live Chat</i> | 4 |
| <i>Callback Requests (Premium Support only)</i> | 5 |
| <i>Phone Support (Premium Enterprise Support only)</i> | 5 |
| IBM Trusteer Endpoint Protection Console | 5 |
| Customer Portal | 6 |
| Supported Languages | 6 |

| | |
|----------------------------------------------------------------------------|-----------|
| Dedicated Support Team (Enterprise Support only) | 6 |
| Short Escalation Process (Enterprise Support only) | 7 |
| Product Updates and Releases (Enterprise Support only) | 7 |
| Product Development and Feature Requests (Premium Enterprise Support only) | 7 |
| Contacts | 7 |
| 3. Setting Case Priority | 9 |
| 4. Service Levels | 10 |
| 5. How to Open and Manage a Support Case | 11 |
| Prior to Opening a Case | 11 |
| How Do I Open a Case? | 11 |
| Required Information | 11 |
| The Case Workflow | 12 |
| Tracking Case Status (Customers only) | 12 |
| Escalating a Case | 13 |
| Closing a Case | 13 |
| 6. How to Investigate a Suspected Fraud Attempt | 15 |
| Prior to Investigation | 15 |
| Initiating an Investigation | 15 |
| Required Information | 15 |
| Advanced investigation | 16 |
| Closing the Investigation | 16 |

1. Front Matter

About this Publication

IBM strives to help you and your customers get maximum protection from threats of financial malware and phishing through the use of our security software and related services. We consider you partners in this process and believe that clarity of the support process and mutual coordination are important in achieving this goal. This document aims to help you better understand our support procedures as well as create and streamline support processes that are beneficial to you and your customers.

Support Information

For support information, refer to our Support website:

<http://www.trusteer.com/support>

Accessibility

Accessibility features help users with a disability, such as restricted mobility or limited vision, to use software products successfully. With this product, you can use assistive technologies to hear and navigate the interface.

Statement of Good Security Practices

IT system security involves protecting systems and information through prevention, detection and response to improper access from within and outside your organization. Improper access can result in information being altered, destroyed, misappropriated or misused or can result in damage to or misuse of your systems, including for use in attacks on others. No IT system or product should be considered completely secure and no single product, service or security measure can be completely effective in preventing improper use or access. IBM® systems, products and services are designed to be part of a comprehensive security approach, which will necessarily involve additional operational procedures, and may require other systems, products or services to be most effective. IBM DOES NOT WARRANT THAT ANY SYSTEMS, PRODUCTS OR SERVICES ARE IMMUNE FROM, OR WILL MAKE YOUR ORGANIZATION IMMUNE FROM, THE MALICIOUS OR ILLEGAL CONDUCT OF ANY PARTY.

2. IBM Trusteer Support

Overview

IBM Trusteer Support offers two types of support: Enterprise and Consumer. Enterprise support is for organizations that purchase IBM Trusteer products. Consumer support is for end users, i.e. the customers of organization that purchase IBM Trusteer products.

In addition, for each type of support there are two types of support levels: Basic and Premium.

The following table summarizes the IBM Trusteer support features for each offering:

| Feature | Consumer | | Enterprise | |
|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|--------------------------------------------|------------------------------------------------|
| | Basic | Premium | Basic | Premium |
| Support audience | End users | End users | Customers, Enterprises, On-Line Businesses | Customers, Enterprises, On-Line Businesses |
| Support availability | 8am to 5pm local time | 24x7 | 8am to 5pm local time | 24x7 |
| Available channels of communication | Website Email Chat | Website Email Chat Call-back | Website Email Chat Call-back | Website Email Chat Call-back Phone |
| Language support | Off-line communication (Email): English, Japanese, Portuguese, Dutch, French, Spanish and German On-line communication: English and Japanese only | | | |
| Dedicated support team | x | x | ✓ | ✓ |
| Short escalation process | x | x | ✓ | ✓ |
| Proactive updates about releases, known issues and resolutions | x | x | ✓ | ✓ |
| Access to private support portal for case status review | x | x | ✓ | ✓ |
| Open communication channel with IBM Trusteer for product development and feature requests | x | x | x | ✓ |

Availability

IBM Trusteer operates a 24 hour support center to address any questions or issues that you or your customers may have about IBM Trusteer products.

Communication Channels

IBM Trusteer Support offers customers and end users the following communication channels:

- Email
- Live Chat
- Callback Requests (premium support only)
- Phone support (premium enterprise support only)
- Customer Portal (Enterprise support only)

Email communication, live chat and callback requests can all be initiated via the IBM Trusteer support site: www.trusteer.com/support.

Email – for End-users

IBM Trusteer Consumer Support can be contacted by submitting a request at: www.trusteer.com/support/submit-ticket.

Email – for Enterprise

Enterprise customers should contact support by submitting a request at www.trusteer.com/support/enterprise-support-submit-ticket. This is the recommended method for contact via email, as the request form includes the necessary information and enables us to address the issue in the most efficient manner. You may also send an email to trusteer-enterprise-support@us.ibm.com.

Live Chat

Live chat with a support representative can be started by clicking the *live support on-line* link in the IBM Trusteer support website or by using this direct [link](#).

IBM Trusteer aims to provide an immediate human response to any eligible user contacting us via this option.

Callback Requests (Premium Support only)

An IBM Trusteer end-user can request a call from a support representative by filling in a form on the support website.

You can submit a callback request by clicking the *Request Callback* link in the IBM Trusteer Support website or directly by using this link: www.trusteer.com/support/callback-request.

Phone Support (Premium Enterprise Support only)

Premium Enterprise customers can call IBM Trusteer Support directly for urgent issues. We are available over the phone 24x7 using the phone numbers found in the Customer Portal - <https://trusteersupport.force.com/Support>

Please note that these numbers are for enterprise only. Do not forward these numbers to your customers.

IBM Trusteer Endpoint Protection Console

The console for IBM Security Trusteer Rapport or IBM Security Trusteer Apex Advanced Malware Protection is the recommended way to report a technical issue that occurs on a specific computer. Using this option opens a case automatically and includes all the relevant configuration details needed for troubleshooting (such as version, ID, browser and OS version).

➔ To report an issue from the Rapport/Apex Console:

1. Open the Console by going to Start > All Programs > Trusteer Endpoint Protection > Trusteer Endpoint Protection Console.
2. In the Help and Support area, click *Report a problem*.
3. Fill in the form.



4. Click **Submit**.

Customer Portal

Our Customer Portal is a tool for enterprise customers to open, track, monitor and update their support tickets. The portal also includes useful notifications, documents, case reports and FAQs. For more information see the IBM Trusteer Customer Portal User Guide.

The portal is password protected and requires initial registration either via the support site or by sending an email request to the enterprise support (trusteer-enterprise-support@us.ibm.com).

The portal can be accessed from the enterprise support section in our website, or directly using this link - <https://trusteersupport.force.com/Support>.

Please be aware there is a limit on the number of permitted portal user accounts. For more information contact your Customer Success Manager.

Supported Languages

Support via chat, callback requests and calls, is provided in English and Japanese only. Email support is provided in many other languages (Portuguese, Dutch, French, Spanish and German). IBM Trusteer is looking into providing support in other languages in the future.

Dedicated Support Team (Enterprise Support only)

IBM Trusteer Support has a team of support specialists that are dedicated for enterprise support only. These specialists are highly experienced and specifically trained to handle customer related inquiries and also have direct access to development teams which enables them to identify and fix problems in the fastest and most efficient way.



Short Escalation Process (Enterprise Support only)

Should you not be content with the level of service which you have received, you may ask to immediately be escalated to a Support Manager. This request is handled with high priority and a manager will be assigned to your case.

Product Updates and Releases (Enterprise Support only)

Organizations have an option to join the Enterprise Support Program by sending a request email to trusteer-enterprise-support@us.ibm.com.

By joining this program you will be added to the list of recipients of all of IBM Trusteer's important updates and product release notifications. New product versions for download, product issues and resolutions, and scheduled maintenance notices are only part of the information which you will be able to receive.

Product Development and Feature Requests (Premium Enterprise Support only)

Enterprise Support encourages feedback. The more Enterprise Support understands your environment and how you use IBM Trusteer products, the better they can serve your needs and design future products. Customers can also request features through Enterprise Support which will be communicated to IBM Trusteer's product teams.

Contacts

Customers may be contacted by IBM Trusteer for a variety of reasons, including technical emergencies, security issues, and product notifications. During the product setup, IBM Trusteer asks the customer for a contact list for three types of communication:

- **Technical Emergency** - notified in case of technical issues, such as service interruptions.

- **Security Emergency** - notified in case of security incidents, frauds investigations, new malware, etc.
- **Product Notifications** - notified about product related matters, such as version updates, EOL, and new features.

3. Setting Case Priority

The case priority is set based on the business impact as described below. In all cases the issues must be reproducible by IBM Trusteer in order for us to meet the SLA requirements:

- **High** – applies in one of the following cases:
 1. The online service is either substantially inoperative or unusable, or where a major function of the current release or any previous release is unusable or substantially inoperable as a result of an incident.
 2. A problem in the current release or any previous release affects the end users' ability to use the licensed program(s) in accordance with the equipment or access the internet and affects the majority of users.
- **Medium** – applies in one of the following cases:
 1. The online service has an incident which has an adverse impact on its use or functionality.
 2. Affects many end users and is visible but end users are still able to use the licensed program(s) in accordance with the equipment.
 3. Affects a small number of users and prevents them from working or accessing the internet.
- **Low** – applies in one of the following cases:
 1. The online services have a minor problem which has a workaround for the end users concerned without significant inconvenience.
 2. Any other issue which has a workaround or affects a small number of end users.

4. Service Levels

Based on the priority as categorized in the previous section IBM Trusteer shall follow the following Service Levels:

| Incident | Response Time | Target Resolution |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| High | First response: <ul style="list-style-type: none"> • Immediately for on-line communication Workaround: <ul style="list-style-type: none"> • Within 24 hours. Permanent fix: <ul style="list-style-type: none"> • As soon as available. | Issue automated email within 30 minutes of receipt of support email. Provide a decent workaround or assist user in un-installing software unless a short term fix is available. Within 24 hours provide estimate timing for a permanent fix. Dedicate all necessary reasonable resources on a priority basis to resolve the incident. If possible, deploy previous version of software as a workaround. |
| Medium | First response: <ul style="list-style-type: none"> • 30 minutes automatic response • Within 8 hours for human response. Workaround: <ul style="list-style-type: none"> • Within 2 working days. Permanent fix: <ul style="list-style-type: none"> • In the next product or configuration release | Issue automated email within 30 minutes of receipt of support email. Provide a decent workaround or assist user in un-installing software unless near term fix is available. Within 24 hours provide estimate timing for a permanent fix. If possible, deploy previous version of software as a workaround. |
| Low | First response: <ul style="list-style-type: none"> • 30 minutes automatic response • Within 24 hours for human response. Workaround: <ul style="list-style-type: none"> • Within 7 working days. Permanent fix: <ul style="list-style-type: none"> • In future release. | Issue automated email to Account Holders within 30 minutes of receipt of support email. Advise when a permanent fix will be available within 7 working days. If possible, deploy previous version of software as a workaround. |

5. How to Open and Manage a Support Case

Prior to Opening a Case

When encountering an issue with IBM Trusteer products or if you have questions regarding any of the IBM Trusteer products we strongly recommend trying to search for an answer in IBM Trusteer Support's website (www.trusteer.com/support).

The website includes a vast amount of knowledge and provides easy access to the most frequently asked questions. In addition, there is a very intuitive search engine that can get you the required answers quickly. This search engine is available in the following languages: English, Spanish, Dutch, Portuguese, French, German and Japanese.

We also recommend checking our supported platforms page www.trusteer.com/support/supported-platforms to make sure your platform is supported.

How Do I Open a Case?

If you failed to find a solution in our knowledge base, use one of the communication channels described in [Communication Channels](#) (on page 4) to open a case. Note that if it is a high priority issue you should use phone or chat to report it. For more information on priority levels refer to [Setting Case Priority](#) (on page 9).

Required Information

In order for us to provide the most efficient support we recommend providing the following details when opening a case:

- Contact information - Please provide both email address and phone number.

- Rapport or Apex origin - If you are an end user this refers to the financial institution that offered you IBM Security Trusteer Rapport or IBM Security Trusteer Apex Advanced Malware Protection. If Rapport or Apex is used internally this refers to your company name.
- Rapport or Apex version and ID- This can be found in the console, under *Product Settings*.
- Installation date - If you do not know the specific date, mention if it is a new installation (within the last 3 days) or an old installation.
- Internet browser - The browser you were using when you encountered the problem.
- OS version - Your computer OS version.

The Case Workflow

Once a case is submitted, an automatic email confirming that the case was opened will be sent. The email includes the case number which should be included in any correspondence with IBM Trusteer so that the issue may be properly tracked.

Once the case is in the support queue a Support Engineer takes ownership. The Support Engineer works with the user to solve the issue using a number of methods such as log review, tracing, and remote access to the user client. The Support Engineer, in consultation with the case initiator agrees on an action plan for troubleshooting and resolving the issue within a reasonable time. The case initiator must be available to work with the Support Engineer to resolve the issue.

Tracking Case Status (Customers only)

As an IBM Trusteer customer you are able to track your cases and your end user cases using the self-service portal. You can log into the self-service portal from this link:

www.trusteer.com/support/enterprise-support-main

If you do not have login credentials, please register from the link on that page or send an email to trusteer-enterprise-support@us.ibm.com and IBM Trusteer will provide you with one.

Escalating a Case

IBM Trusteer support has the following escalation process which is dependent on the case priority:

| Escalation Level | Time before 1st Status Report to Subscriber | Customer Support Manager Status Report to Subscriber | Business Account Manager Status Report to Subscriber | Managing Director Status Report to Subscriber |
|------------------|---------------------------------------------|------------------------------------------------------|------------------------------------------------------|-----------------------------------------------|
| High | 24 hours | 2 business days | 5 business days | 14 business days |
| Medium | 3 business days | 5 business days | 10 business days | 30 business days |
| Low | 30 business days | 60 business days | 90 business days | N/A |

If you feel a specific case is not getting the service that you expected, please follow these steps:

1. Contact support (using email, callback or phone call) and ask to speak with a Support Manager.
2. If you find the Support Manager's answer is insufficient, ask to speak with the Head of Support.
3. If you find that the Head of Support's answer is insufficient, ask to speak with the Business Account Manager
4. If you find that the Business Account Manager's answer is insufficient, ask to speak with the VP Services.

Closing a Case

Cases are closed when the Support Engineer, in consultation with the case initiator, agree that a resolution has been reached. If the same issue re-occurs, the original case can be re-opened within 10 business days. After this period, a new case will be opened.

Cases may also be closed due to the following:

- The case initiator informs the Support Engineer that the case is no longer relevant.
- The case initiator and Support Engineer agree that the issue is not an IBM Trusteerrelated issue.
- The case initiator does not respond to a Support Engineer request within 5 days. In this case, for end users the case is closed automatically. For enterprise users, the Support Engineer will try to follow up twice (usually once via email and once via phone) and if there is no response the case will be closed.

6. How to Investigate a Suspected Fraud Attempt

Prior to Investigation

If you suspect a customer has been the victim of a fraud attempt, instruct the customer to follow two basic steps:

1. Refrain from online banking or any sensitive browsing as the computer may be infected.
2. Do not shut down, reformat the machine or attempt to remove the infection in any way. This might disrupt further investigation.

Once the customer has completed these steps, please initiate an investigation as described in the next section.

Initiating an Investigation

To report a security incident, please email all relevant information to trusteer-enterprise-support@us.ibm.com. The IBM Trusteer Enterprise Support team will engage the IBM Trusteer Fraud Analysis team and open a fraud investigation case.

Required Information

In order to investigate fraud attempts accurately and efficiently, the IBM Trusteer Fraud Analysis team requires the following information:

- The Agent Key from the infected computer. This can be found in the Trusteer Endpoint Protection Console, under *Product Settings*.
- The exact time and date of the suspected fraud. If there were several fraud incidents, please be sure to provide the relevant time and date for each incident.
- General description of the event. Include information about any suspicious behavior the user encountered.

- Additional useful details, such as screen captures or the suspicious URL address (optional).

Advanced investigation

For certain investigations, the IBM Trusteer Fraud Analysis team may need to collect additional information from the infected machine. In that case, the Enterprise Support team will ask for contact information in order to contact the customer directly. In rare occasions, Enterprise Support will schedule a remote access session with the customer in which our fraud researchers will connect remotely to the infected machine.

Closing the Investigation

Investigations are closed when the Support Engineer, in consultation with the Security team and the case initiator, agree that a resolution has been reached. The IBM Trusteer Fraud Analysis team will provide the root cause and implement any changes necessary for future fraud prevention. Once the investigation is complete the Enterprise Support team will issue a detailed report of the incident, as well as any actions required to remove the infection.