

## Clearswift Services

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Service Support Offerings Professional  
& Learning Services

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## Introduction

Clearswift is dedicated to optimising the success of our customers and to attaining the highest levels of customer satisfaction through the delivery of professional, efficient and high quality services across the Clearswift product portfolio.

### 1.1 Purpose

The purpose of this document is to describe the service support, professional and learning services available from Clearswift, inclusive of deliverables and pricing.

### 1.2 Scope

This document applies to Clearswift proprietary software product(s) and solutions licensed to the customer under the Clearswift License Agreement and covered under the terms of the Clearswift Support Agreement. All references to Clearswift product in this document refer to such licensed product. Please refer to the Clearswift Support Agreement for details on maintenance terms and conditions.

*Note: This document will be revised periodically to reflect changes in the products, solutions and services offered to the market by Clearswift Limited. The latest version of this document is posted on the Clearswift Support Portal ([support.clearswift.com/portal](http://support.clearswift.com/portal)).*

### 1.3 Referenced documents

- Clearswift Support Agreement

*Version 1.0*

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## 2 Support Services

Clearswift recognises that good support services are fundamental to extracting the full benefit from Clearswift products and solutions and aim to maximise and protect our customers' investment through the delivery of comprehensive service offerings. Our services are developed to cater for the different needs of our customers and to ensure ongoing and consistent operational capabilities throughout the lifetime of the products and solutions.

### 2.1 Tiered Service Support Offerings

Clearswift provide three tiers of service built from an essential foundation support tier which can be further enhanced with additional services.

- **Standard** service; a highly reactive and responsive 24\*7 service, enabling Clearswift to take immediate ownership of reported issues, providing full visibility of progress and status through the end-to-end management of incidents. Customers automatically receive Standard Support as part of their solution.
- **Advanced** service; recognising the business critical nature of Clearswift solutions, delivers enhanced support capabilities including automated service monitoring, reporting and regular service reviews, to further secure consistent operational availability through a more proactive level of support.
- **Premium** service; a highly intimate service delivering additional value add services through a Support Account Manager, inclusive of best practice consultation, an annual service health check, on-site support days and regular on premise service reviews, in true partnership with our customers.

### 2.2 Service Offerings at a Glance

Service Plan:	Standard	Advanced GBP 30k Annual Maintenance	Premium GBP 60K Annual Maintenance
Support access via web portal, phone and e-mail	✓	✓	✓
Standard service hours: 24*7 excluding 6 stated public holidays	✓	✓	✓
Unlimited 24*7 access to the Support Portal knowledge base	✓	✓	✓
2 registered Technical Contacts per deployment	✓	✓	✓
Access to new version upgrade releases	✓	✓	✓
Automated maintenance release updates	✓	✓	✓
Defined Service Level Targets for Incident Response and Resolution	✓	✓	✓
Proactive system monitoring	✓	✓	✓
Proactive communications (Forums and RSS Service Feeds)	✓	✓	✓
1 additional Technical Contact per deployment	x	✓	✓
Single Point of Contact for fast-track escalation and service reporting	x	✓	✓
Quarterly service reviews (telephone)	x	✓	✓
Proactive system monitoring and exception reporting	x	✓	✓
Assigned Support Account Manager (SAM)	x	x	✓
Annually scheduled system health check	x	x	✓
2 on-site support call off days	x	x	✓
Quarterly service reviews (on site)	x	x	✓
Best Practice consulting on policy and compliance	x	x	✓
Dedicated 'Policy' support infrastructure	x	x	✓

### 2.3 Standard Service

The Clearswift Standard service offering provides a comprehensive package of benefits, giving peace of mind to users of Clearswift products and solutions that they are effectively supported and that all service requests are formally tracked and resolved in a timely manner.

Standard Support includes web, email and phone-based customer support for two nominated technical contacts that have 24\*7 access to the global technical support team and the resources available on the customer Support Portal. Technical contacts are able to track support incidents and benefit from a specialist knowledge base and networking opportunities. Customers can also contribute to the product roadmap by raising product enhancement requests.

The Standard offering includes:

- 24\*7 Service Desk support, with weekend calls routed to on call engineers via a call logging service
- 24\*7 access to the Customer Support Portal for access to knowledge base and additional informational and self-help resources
- First line (L1) application/product support for initial review and response to customer service requests and escalation of unresolved issues to technical support specialists
- Second line (L2) technical support through product specialists and subject matter experts for the provision of comprehensive diagnostic and root cause analysis and Incident resolution
- Third line (L3) escalation support through product development engineers for the provision of Problem resolution and corrective maintenance releases
- Entitlement to future, evolutionary upgrade releases for licensed product
- Subscriptions to live service feeds providing protection from the latest threats, including anti-virus and spyware updates and the latest filter information from Clearswift's world-leading URL database

### 2.4 Advanced Service

The Advanced offering builds on the foundation of the Standard package, with the following additional services;

- Assigned Single point of contact for Escalation and Service Reporting
- Quarterly service reviews to ensure full feedback on the quality of service delivery
- Remote system monitoring and proactive health checks facilitated through the Clearswift Call Home statistics

## 2.5 Premium Service

The Premium service offering provides all services available under the Standard and Advanced offerings. It is designed to offer a greater level of partnership and proactive service to ensure that customers continue to maximize the business value of Clearswift solutions post deployment, through the delivery of the following additional services:

- Support Account Manager (SAM), a named resource assigned to a customer to manage the delivery of post-sales support and services. While issue reporting and resolution continue to leverage the existing channels, the service delivery process is enhanced by the services of a SAM, a Support Engineer who provides continuity by acting as the customer advocate and escalation facilitator for all support services. The core deliverables for the role are;
  - A primary point of escalation serving as an advocate for customer needs
  - Resolution of post-sales customer inquiries relating to products and/or services
  - Providing information relating to new/enhanced product and service offerings
  - Regularly scheduled reviews of Incidents, defining action plans and ensuring correct priority
  - Proactive communication of updates, including the status of software change requests (SCRs)
  - Coordination of appropriate interdepartmental resources within Clearswift to expedite resolution
  - Service Level reporting
- Annual system health check to ensure that Clearswift solutions are operating at optimum levels
- Quarterly service reviews, at the customer site, to ensure full feedback on the quality of service delivery
- Proactive service advice to ensure that our customers are fully aware of the future product roadmap and engaged in influencing roadmap content
- Best practice consulting on Policy and Compliance to ensure that customers are using the Clearswift solutions to their full potential
- Dedicated support infrastructure for Policy replication to expedite incident resolution
- Two call-off days for on-site support

### 3 Professional Services

Clearswift recognise that at times customers will need expert knowledge to assist with the installation, deployment, upgrade or migration of Clearswift products, or to conduct periodic health checks or provide consultation around business process change in existing solutions. The range of service packages that we offer has been designed to ensure that customers will get the maximum value from their investment in Clearswift products and solutions.

#### 3.1 Professional Services at a Glance

Service Package:	Duration	Deliverables	Pricing
Policy Migration	1 Day (AVG)	<ul style="list-style-type: none"><li>Review of policy and scoping for Policy Definition</li><li>Migration of policy</li><li>Best Practice consultation</li></ul>	£800 >75 users £300 <75 users
System Health Check	1 Day	<ul style="list-style-type: none"><li>Review of infrastructure</li><li>Review of content policy</li><li>Documentation</li></ul>	£1000 per day + T&E on premise £750 remote
Installation / Release Upgrade (Software)	Variable	<ul style="list-style-type: none"><li>Scoping</li><li>Configuration and Implementation</li><li>Go-live &amp; UAT</li><li>Documentation and orientation</li></ul>	£1000 per day + T&E
Installation (Gateway Appliance)	Variable	<ul style="list-style-type: none"><li>Scoping</li><li>Configuration and Implementation</li><li>Go-live &amp; UAT</li><li>Documentation and orientation</li></ul>	£1000 per day + T&E
Policy Definition	2 Days	<ul style="list-style-type: none"><li>Scoping</li><li>Implementation</li><li>Documentation and orientation</li></ul>	£1000 per day + T&E
Training/Learning Services		<ul style="list-style-type: none"><li>Standard course delivery or</li><li>Custom knowledge transfer workshop</li></ul>	£500 set up (half day) £1500 per day + T&E

#### 3.2 Policy Migration

For those customers considering migrating to the Clearswift SECURE Email Gateway, the policy migration service makes the transition to a new technology really simple. We'll review your existing content policy, transfer it to the SECURE Gateway platform and make recommendations for future improvements.

**Duration** Average engagement of one day to include;

- Review of policy to determine scope of migration and whether a 'Policy Definition' service is a prerequisite (for complex policies and environments)
- Migration of policy from software to Gateway platforms
- Recommendation for further improvement based on best practice

#### 3.3 System Health Check

Systems often sit in server rooms actively servicing the requirements of the business, but unless there is a problem, no one will question whether the system is processing effectively. The health check service will review the existing Clearswift deployment, ensuring that it is optimally deployed and providing recommendations for further improvement.

**Duration** 1 day to include;

- Review of infrastructure
- Review of content policy
- Documentation
  - Existing policy
  - Recommendations

### 3.4 Installation/Upgrade (Software)

Installing or upgrading between major releases will often result in a significant number of operational questions and issues. Utilising this service our experts will ensure that the install/upgrade is planned and executed effectively, with full user sign off for production deployment. The service also provides the additional benefit of release training to ensure that customers are quickly ready and able to take advantage of the features and functions within the product.

**Duration** Variable engagement determined by scoping, to include;

- Discovery and scoping
- Configuration and Implementation
- Go-live & customer acceptance
- Documentation and customer familiarisation

### 3.5 Installation (Gateway)

The Clearswift SECURE Gateway suite of products is straightforward to install, but through this service we will ensure that the deployment is optimised to the specific environment, configured to suit unique business requirements and that customers are fully familiar with the operation prior to live deployment.

**Duration** Variable engagement determined by scoping, to include;

- Discovery and scoping
- Configuration and Implementation
- Go-live & customer acceptance
- Documentation and customer familiarisation

### 3.6 Policy Definition

Whatever content analysis requirements your business has, we will design and build a policy to ensure that they are met.

**Duration** Minimum 2 days to include;

- Discovery & scoping of work
- Implementation of recommendations
- Documentation and customer familiarisation

More information on Clearswift Professional Services can be found at <http://www.clearswift.com/support/professional-services>

## 4 Learning Services

Clearswift offer a range of learning services that can be delivered in standard form as classroom led training and certification courses per product, or custom designed to provide bespoke knowledge transfer workshops specific to a customer solution.

### 4.1 Clearswift Engineer (CE) MIMESweeper for SMTP Level 1

**Duration** 3 days

#### **Course Outline**

This instructor-led course will introduce you to the architecture and features of MIMESweeper for SMTP. You will have opportunity to install, deploy and manage the system.

#### **Target Audience**

This course is designed for anyone who is responsible for installing and deploying a content security solution for SMTP-based email.

#### **Course Pre-Requisites**

- TCP/IP Networking
- SMTP-based messaging systems

#### **Course Content**

- UNIT 1 - Introduction
  - Internet Messaging Principles
  - Messaging and Perimeter Security
  - MIMESweeper Messaging Functional Overview
  - Information Gathering
- UNIT 2 - Deploying MIMESweeper for SMTP
  - MIMESweeper for SMTP Overview
  - Installation
  - Initial Policy
  - Refining Policy
  - Hygiene Policies
  - Content Security Policies
  - Data Leakage Prevention Policies
  - Scenario Reference
- UNIT 3 - Managing MIMESweeper for SMTP
  - System Management
  - Message Management
  - Personal Message Management and Message Tracking
  - Report Management
  - User Management
  - System Maintenance

## 4.2 Clearswift Engineer (CE) MIMESweeper for SMTP Level 2

**Duration** 2 days

### Course Outline

This instructor-led course will enable you to configure MIMESweeper for SMTP, troubleshoot problems and deploy the Edge Server.

### Target Audience

This course is designed for anyone who is responsible for managing a multi-host deployment of the product, configuring and troubleshooting the system and deploying the Edge Server.

### Course Pre-Requisites

- Clearswift Engineer (CE) MIMESweeper for SMTP Level 1
- TCP/IP Networking
- SMTP-based messaging systems

### Course Content

- UNIT 4 - Configuring MIMESweeper for SMTP
  - Clustered Deployment
  - Relay Operation and Protection
  - Policy and Message Metadata Management
  - Audit Metadata Management
  - Tracking Metadata Management
- UNIT 5 - Deploying Edge Server
  - Edge Server Overview
  - Installation
  - Policy Management
  - Message Management
  - Report Management
  - System Management

## 4.3 Clearswift Engineer (CE) Clearswift SECURE Email Gateway

**Duration** 1 days

### Course Outline

This Instructor-led, classroom based course will introduce you to the administration and management of the Clearswift SECURE Email Gateway. You will learn how messages are processed, how to configure policy, backup, recovery, troubleshoot and support a Gateway deployment.

### Target Audience

This course is designed for anyone who is responsible for managing and supporting a content security solution for SMTP-based email, using the Clearswift SECURE Email Gateway.

### Course Pre-Requisites

- TCP/IP Networking
- SMTP-based messaging systems

### Course Content

- Module 1 - Introduction
- Module 2 - Message Flow
- Module 3 - Updates
- Module 4 - Backup, Failover and Recovery
- Module 5 - Policy and Message Management
- Module 6 - Troubleshooting and Support

#### 4.4 Clearswift Engineer (CE) Clearswift SECURE Web Gateway

**Duration** 1 days

##### **Course Outline**

This instructor-led, classroom based course will introduce you to the administration and management of the Clearswift SECURE Web Gateway. You will learn how URL requests are processed, how to configure policy, backup, recovery, troubleshoot and support a Gateway deployment.

##### **Target Audience**

This course is designed for anyone who is responsible for managing and supporting a content security solution for Web, using the Clearswift SECURE Web Gateway.

##### **Course Pre-Requisites**

- TCP/IP networking
- HTTP

##### **Course Content**

- Module 1 - Introduction
- Module 2 - Architecture
- Module 3 - Updates
- Module 4 - Backup, Recovery and Failover
- Module 5 - Policy Management
- Module 6 - Troubleshooting and Support

More information pertaining to Clearswift training courses and scheduling can be found at <http://www.clearswift.com/support/training>.

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## 5 Document History

Version	Date	Authors	Comments
1.0	24.05.11	Dat Thrower	Clearswift Services version 1.0