

Behind the Scenes with Customer Success

Brasil Customer User Group

November 29th, 2023

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Boom Links
















IdentityNow Boom Links

IdentityNow Boom Links – Find content faster!



Tip: Search for key words using Control F (for Windows users) or Command F (for MAC users).
Found a broken link? Email our CSM Help team & we'll make quick corrections!

Learning and Customer Success Resources
















<p>New to SailPoint</p>  <p>Getting Started Recommendations</p>	<p>Customer Success Help</p>  <p>Get assistance from customer success</p>	<p>Success Engineering</p>  <p>Customer Success Engineering FAQs</p>	<p>Identity University</p>  <p>Product Training & Certifications</p>	<p>Education Services Help</p>  <p>First, make sure to review our FAQ</p>
<p>Community Announcements</p>  <p>News across the community</p>	<p>SailPoint Events</p>  <p>User Groups, Office Hours, and more</p>	<p>Video Chapter Catalog</p>  <p>Browse hundreds of categorized videos</p>	<p>Implementation Resources</p>  <p>Implementation tools and guides</p>	<p>Business Value Review</p>  <p>Review your program's ROI</p>
<p>SailPoint Partners</p>  <p>Find SailPoint partners</p>	<p>User Group Directory</p>  <p>Join SailPoint user groups</p>	<p>Become an Admiral</p>  <p>Network & elevate your reputation</p>	<p>IdentityNow General FAQs</p>  <p>Review common IdentityNow FAQs</p>	<p>Interactive Demos</p>  <p>See SailPoint in action</p>

IdentityIQ Boom Links

IdentityIQ Boom Links – Find content faster! 📄🔗

Tip: Search using Control F (for Windows users) or Command F (for MAC users).
Found a broken link? Email our CSM Help team & we will make quick corrections!

Learning and Customer Success Resources

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<p>SailPoint Partners</p>  <p>Find SailPoint partners</p>	<p>User Group Directory</p>  <p>Join a local user group</p>	<p>Become an Admiral</p>  <p>Network & elevate your reputation</p>	<p>Free SaaS Migration Assessment</p>  <p>Detailed analysis including ROI timeline</p>	<p>Customer Agreements</p>  <p>Key terms & conditions</p>

Support

SailPoint – Working with Support

Click [HERE](#) to access the Working with Support page on Compass

The screenshot shows the 'Working With Support' page. At the top, there is a search bar with 'All content' selected and a search icon. Below the search bar, the breadcrumb navigation reads 'Compass > Services and Support > Working With Support' and an 'Options' menu icon. The main content area features a mission statement: 'Our mission is to provide you with a best-in-class support experience. We continually develop our service to meet and exceed your expectations and contribute to your success by providing timely, consistently high-quality IT support, at every contact.' To the right of the mission statement is a 'How to Get Help' box with two links: 'Log a Severity 1 Support Ticket' and 'Log a Support Ticket'. Below this are ten icons representing different support services: Contact Support, Support Portal Knowledge Base, SailPoint Support Guide, Support Ticket Checklist, Manage Your Tickets, Escalate Your Case, What is Supported, Weekend Go-Live Support, On-Premise End of Life Support Dates, and On-Premise Product Upgrades.

Click [HERE](#) for a tutorial to submit a Support Ticket or Expert Services request

The screenshot shows the 'Overview' page of the SailPoint Support Portal. The page title is 'Overview'. The main text reads: 'This guide provides detailed information on how to navigate through the portal. Browse the user-friendly catalog and search for knowledge articles based on category, rating, or views. File a support request and keep track of all your cases based on type or status. Whether you read knowledge articles or create support requests, the **SailPoint Support Portal** is the place to find all the answers you need at any time.' Below this is a section titled 'Logging In to the SailPoint Support Portal' with a single step: '1. Begin by heading to the **SailPoint Support Portal** and then select **Sign In** located at the upper right-hand corner.' The navigation bar includes 'SailPoint', 'Customer Support', 'Knowledge', 'Resources', 'Community', 'Support', and a 'Sign In' button. The main content area has a blue background with the text 'Welcome to SailPoint Support' and 'Find the answers you need when you need them'. Below this is a search bar with the placeholder text 'Search (minimum 3 characters)' and a search icon. At the bottom, there are two buttons: 'Find Knowledge' (with the subtext 'Read knowledge articles for help & FAQs') and 'View Cases' (with the subtext 'Check the status of your requests & cases').

Registering for Compass to access the Support Portal

Click **Join Us!** at
<https://community.sailpoint.com>

Online **Support Portal** (*Preferred*) via
Compass or <https://support.sailpoint.com>

Email: support@sailpoint.com

Phone: to open a **Priority 1** ticket or to
change an existing Support Case to Priority
1, **please contact SailPoint Support via
phone.** U.S. customers can call toll-free: [+1
888-745-7607](tel:+18887457607) or local: [+1 737-218-6538](tel:+17372186538).



You must have a Compass
Account to access the Support
Portal

If you are having issues using or logging-in
to Compass, please email
compass-help@sailpoint.com

Working with Support Tips and Tricks

Explain the Impact – Business Justification

- **Set the impact level. Provide details in the description.**
 - Is the problem reproducible or intermittent? If reproducible, what is the step-by-step process to reproduce?
 - Was this working previously, and if so, is this the first occurrence of the error or issue? If previously working, when did it stop working, or when did you notice the issue/errors?
 - What is the expected outcome versus the actual outcome?
 - Is there a workaround currently being used for the issue?

More Information = Faster Resolution

- Steps to replicate, Log files, Screenshots, XML objects

Communicate Constantly

- Answer every question, Never assume, Be clear, Ask questions for clarification, Tell us when the priority changes and the “why”
- Request updates within the support ticket – *avoid sideline emails as much as possible*

Defining Urgency, Impact and Priority Settings

Incident Factor	Description
IMPACT Set by CUSTOMER	<p>Impact measures the extent of disruption that an incident, problem or change has on business processes.</p> <p>This can be thought of as the size of the issue.</p> <p><i>What is the blast radius?</i></p>
PRIORITY Set by SUPPORT	<p>Priority is used to define the relative significance of an incident, problem or change.</p> <p>The impact level selected by customer and urgency of an incident are used to determine the priority of an incident.</p> <p>It is used to identify the required time for action to be taken on the incident.</p>

Impact Settings – selected by Customer

Impact Level	Definition/Product Impact
Widespread	Feature unstable, no workaround
Large	Feature unstable, workaround available
Limited	Feature degraded or failure of non-critical feature
Localized	Delayed jobs, minor performance issues, cosmetic, or minor bugs

Priority Settings – selected by Support

Impact & Severity Level	Definition	Support Availability	Initial Response Time	Submission Method
Priority 1 (Major)	Production System or Service is down or unusable and no workaround is available	24X7 Post Go-live ONLY	30 Minutes	<i>Phone Only</i> <i>(International Customers call the toll free # from a Skype account)</i> Toll-free: +1 888-745-7607 or Local: +1 737-218-6538
Priority 2 (Moderate)	Major issue occurring on the production system severely impacting business. Many users are impacted but can work in limited capacity	Business Hours	1 Hour	All
Priority 3 (Minor)	Partial, non-critical loss of functionality of the software or service is present	Business Hours	4 Hours	All
Priority 4 (Nominal)	General usage questions, cosmetic issues including errors in the documentation	Business Hours	8 Hours	All

When should you Escalate?

There are a number of scenarios in which you may want to escalate your existing support case to ensure your issue is addressed in a manner consistent with your current business needs. Some of these scenarios (business impacts) include:

- You are at risk of missing a deadline, such as a “go live” date, because of the issue
- There is significant business or environmental impact caused by the current issue
- The issue has Executive visibility within your organization
- A release (IdentityNow) did not resolve the issue as expected
- You are generally dissatisfied with how the case has been handled to this point

Steps to Escalate your Case

1. Did you **recently open** the case within 24 hours? (Review Initial Response Time)
2. Did you properly set **Impact level**?
3. Did you communicate the **Business Impact** via the Case?

Now you're ready to escalate your support case

Email customer-escalations@sailpoint.com (CC your COM/CSM) and request an escalation

In your escalations request, please make sure to provide the following information:

- What is the case number?
- Is this a production down situation?
- What is the necessary timeline for resolution?
- What is the current business impact?

When your email is received, one of our Escalation Managers will review your request and take appropriate action

Support & Services – Submitting a Request

Follow this link to [SUBMIT A REQUEST](#)

The screenshot displays the SailPoint Customer Support interface. At the top left is the SailPoint logo. The navigation menu includes 'Customer Support', 'Knowledge', 'Resources', 'Community', and 'Support'. A user profile for 'Rachel Beard' is visible in the top right. Below the navigation is a breadcrumb trail: 'Home > Customer Service > All Categories'. A search bar is located on the right side of the page. The main content area is divided into two sections: 'Categories' on the left and 'Popular Items' on the right. The 'Categories' section lists 'Services' and 'Support'. The 'Popular Items' section features three cards: 'Customer Support' (with a description 'Create a Request for Customer Support' and a 'View Details' link), 'Expert Services' (with a description 'Create a request for Expert Services' and a 'View Details' link), and 'Education Services' (with a description 'Request support for Identity University classes, training content access, training purchases, or general product training information.' and a 'View Details' link). A grid and list view toggle is located in the top right corner of the 'Popular Items' section.

SailPoint | Customer Support Knowledge Resources Community Support RB Rachel Beard

Home > Customer Service > All Categories

Categories

- Services
- Support

Popular Items

- Customer Support**
Create a Request for Customer Support
[View Details](#)
- Expert Services**
Create a request for Expert Services
[View Details](#)
- Education Services**
Request support for Identity University classes, training content access, training purchases, or general product training information.
[View Details](#)

Elevated Access

Elevated Access allows users to see any cases opened by any other user in their organization. This is a powerful permission that can be requested by the appropriate person from your organization such as a manager, supervisor, or director. Elevated Access can be granted at the individual or organizational level.

If you are interested in enabling this feature, please email support-help@sailpoint.com

SaaS Status

To learn how to locate your region, please read this [Support knowledge base article](#).

All Systems Operational

Uptime over the past 90 days. [View historical uptime.](#)



SaaS Updates



SaaS Updates

All content

Search here



Compass > Products > SaaS Solutions > SaaS Updates

Options

< Previous Next >

Updates to Certification Campaigns Page



christine_whitlock
SailPoint Employee

Thursday


Rollout to production tenants is complete.

We've redesigned the Certification Campaigns page to provide a friendlier and easier way to view and manage your certification campaigns. Admins can now view their campaigns in a cards or table view and search their campaigns by name to find them faster.

[Let us know](#) if you have questions or feedback.

[Read more >](#)

Featured topics

Grant Support & Services Access for IdentityNow Tenants  [Iorri...](#)

[UPDATE] Impact of ADV190023 on LDAP Channel Binding and LDAP Signing for SailPoint Sources  [kelly_...](#)

Labels

SaaS Release Notes

SaaS Release Notes

All content ▼ Search here 🔍

Compass > Products > SaaS Solutions > SaaS Release Notes ⋮ Options

Production ^

Recent release notes ^

- February 13, 2023
- February 6, 2023
- January 30, 2023
- January 23, 2023

Older release notes ▼

Preview ▼

Print to PDF

Production release notes – February 13, 2023

Release notes will contain references to new features, enhancements, and fixes that will be gradually turned on in production over the next several weeks.

Note: Connectivity release notes are available in Production on Tuesday for Connector Bundle (CB) and Thursday for Source Configuration (SC) items.

New features

No new features are included in this release.

Enhancements

Product	Feature enhancements
IDN Access Request	Users can now view and manage their Preferences settings from a mobile device browser. These include configurations such as alternate email, alternate phone, and security questions.
Platform	

Training

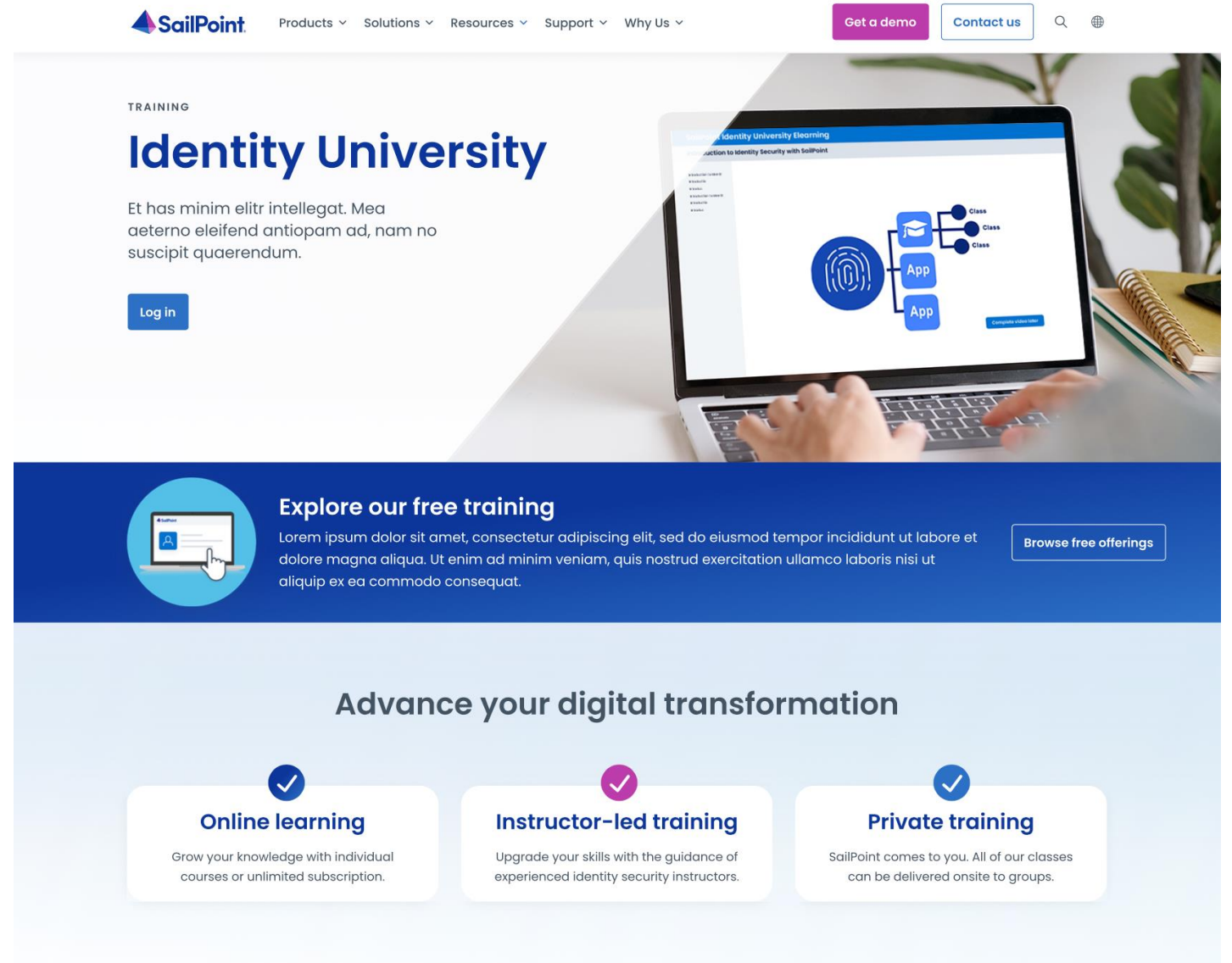
New public Identity University homepage

Official launch: At Navigate

Now you can can...

- Enroll in free introductory training
- Explore new role-based training paths

sailpoint.com/university



Have questions about Training? Subscriptions? Training Units? Courses?

Introducing the Identity University FAQs page!

Find answers to all your questions quickly on our [new Compass page](#).

Welcome to Identity University's support center. Here you'll find information about purchasing, enrolling, and managing training and certification at SailPoint. Select the topic of your question in the filter menu below to find answers to your questions.

Identity University FAQs

All community Search All Content

Compass > Identity University > Identity University FAQs Options

Welcome to Identity University's support center. Here you'll find information about purchasing, enrolling, and managing training and certification at SailPoint. Select the topic of your question in the filter menu below to find answers to your questions.

Filters: Select a Topic Reset

- Are there any free training materials I can access to learn SailPoint?**

Yes, after successfully creating an account and logging in to Identity University, you can register for free introductory classes under the category Free Introductory Training.

[Read more →](#)
- Can a training subscription purchaser also be assigned to the subscription as a learner?**

Yes, a purchaser can also be assigned as learner.

[Read more →](#)
- Can I change the display size of the eLearning video?**

If the eLearning video is not an ideal size in your browser window, use the normal browser zoom (Ctrl+, Ctrl-) to make it larger or smaller as needed. Make sure you are using one of the supported browsers (Chrome, Firefox). Also, to guarantee max width, be sure to collapse the Table of Contents and set the player to full screen.

[Read more →](#)
- Can I request the Enhanced Certification?**

This program has been discontinued as of August 2023. If you currently obtain an Enhanced Certification, it will be valid up until its expiration date.

[Read more →](#)
- Can I take the exam from home?**

Yes. Check out our Test Taker User Guide for more details.

[Read more →](#)
- Do I get a score report?**

Yes, you can request this after completion of the exam. Check out our Test Taker User Guide for more details.

[Read more →](#)

New public Identity University homepage

Investing in the catalogue more than 160+ QuickLearns

Aposta nas subscriptions, credits are still being used but not for long for instructor led training and certifications. 16 free trainings

Developer Community

Announcing the NEW Developer Community Events page! Are you a member yet?

Our Dev Community continues to grow and thrive. Check out [this 1-stop shop](#) to see all the exciting webinars and live-streams available this fall to help you skill-up on both of our platforms! It all starts in September.

- Events for both IIQ and IDN Developers - learn from the folks who built it!
- December 6th - [Developer Community Onboarding](#) (13h - 15h BRT) Welcome to SailPoint! Whether you're a new customer or partner, the SailPoint Developer Relations team will give you everything you need to get started on your journey with us, our products, tools, and our developer community!

Ideas Portal and In Discovery

Where to submit your ideas:

Direct links to:

- [Ideas Portal](#)
- [How to Submit an Idea](#)
- [In Discovery](#)

The screenshot displays the 'SailPoint | Compass Community' website. The navigation bar includes 'Products & Services', 'Resources', and 'Community'. The main content area is divided into four columns: Discussion, Knowledge, Innovation, and Network. The 'Innovation' column is highlighted with a red border and contains two sub-sections: 'Submit an Idea' (with a link to 'Get writing tips curated by SailPoint Product Managers') and 'In Discovery' (with a link to 'Share your input as we research potential SailPoint product initiatives.'). Below the main content, there are links for 'Need Help?', 'FAQ', and 'SailPoint Directory'. At the bottom, there are tabs for 'Highlights', 'Recent Discussions', and 'Announcements'. A blue banner at the bottom right says 'community' and 'Introduce yourself in the welcome forum and find community tutorials' with a 'Start here!' button. A user profile for 'evan_anandappa • SailPoint Employee' is visible at the bottom left with 3 likes, 0 comments, and 221 views.

Learn and Engage

Check out the Video Chapter Catalog

SailPoint Video Chapter Catalog

Press **F11** to exit full screen

Introducing SailPoint's Video Chapter Catalog!

We added chapters to many of our best videos and cataloged them to give you access to hundreds of key topics at your fingertips

How it works: (select a view, browse chapters or do key word searches)

Tips:

- Once you start viewing a chapter, hover your mouse over the blue bubbles in the playback area to see additional topics.
- Be mindful that the date column represents the original creation date, so some of the older videos may contain outdated info.
- Unable to find what you need? [Make a request for SailPoint](#) to consider adding the topic of your choice.

Quick Links:



View the latest video chapters



New to a SailPoint Project



Customer Success Top Picks

Search the catalog! (Select "Views" from the menu)

Video Chapters

Views | Search across all chapters | 6 hidden fields | Filter | Grouped by 2 fields | Sorted by 1 field

V/Chapter	Chap...	Click to ...	Date	YEAR
1522 Q: AI & Service Account sets	19	View	11/11/2022	2022
1523 Q: Access Insights clarification	20	View	11/11/2022	2022
1524 Q: AI & data trust	21	View	11/11/2022	2022
1525 Q: Time to sync data	22	View	11/11/2022	2022
PRIMARY VIDEO				
Building a Successful Identity Program & Where to Start	27			
1526 Start	1	View	11/8/2022	2022
1527 Intro	2	View	11/8/2022	2022

Check out SailPoint Events

Events

All community Search All Content

Compass > Events Options

Upcoming events

Join your peers at our regional and virtual user groups, attend product training sessions, sign up and listen to live and on demand webinars, and much more!

You can also check out our newsletters for the latest events in Identity, as well as how to register.

Americas (AMS)

- [Register now] Resolving the clean data conundrum in Iden...
- [Register now] Identity Security Cloud journey for SAP pr...
- Primeira Encontro de Usuários do Brasil!
- Conheça os próximos avanços em segurança de identidade!

Asia Pacific (APJ)

There are currently no upcoming events for APJ.

Europe, Middle East & Africa (EMEA)

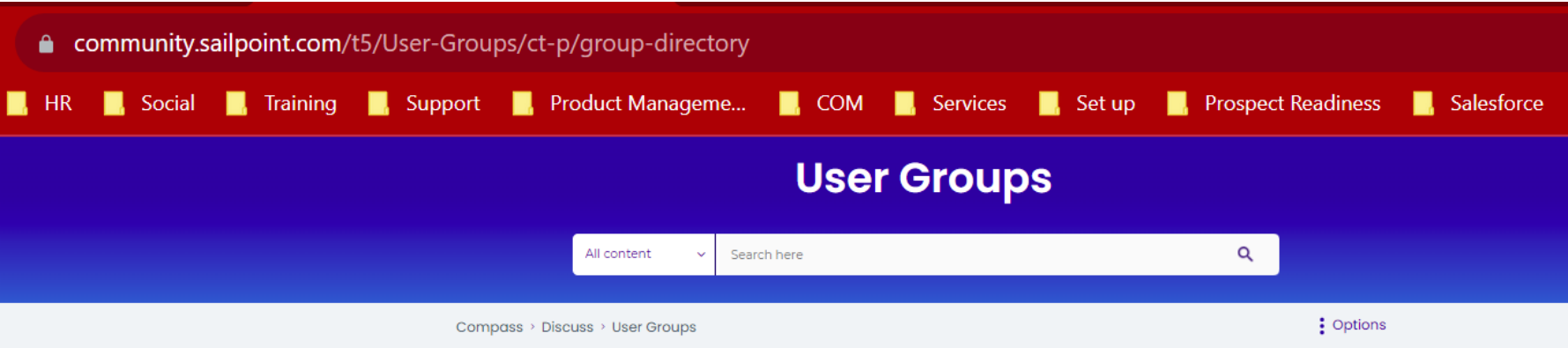
- [Register now] Resolving the clean data conundrum in Iden...
- [Register now] Identity Security Cloud journey for SAP pr...

On Demand events

Explore our on demand events for past user group events, webinars, listen to identity talks with identity experts, and much more!

- Community Day
- News Cruise
- User Group Events
- Crash Courses
- Office Hours
- Customer Showcase
- Product Talks

Join the Brazil User Group



Join a SailPoint User Group, where Identity Security leaders and practitioners come together to solve problems and exchange best practices and ideas. Connect with your peers to learn how they are building and evolving their Identity Governance programs to address a growing number of business challenges.

Filters

- Americas
- Europe, Middle East and Africa
- Asia-Pacific
- Industry
- Virtual

All Groups **My Groups** Alphabetical

 ANZ Education User Group Join	 APAC User Group Join	 Admirals Club View Group	 Benelux User Group Join
 Brazil User Group View Group	 CSM Connect User Group Join	 Canada User Group Join	 Cerner User Group Join

Questions?



Thank You!