Office 365 Support & Managed Services

Service Guide

April 2019

Table of Contents

Introduction

The goal of this document is to provide a detailed description about SHI's Office 365 Support & Managed Services capabilities including how to request support, how escalations are handled, descriptions of our service levels, and an overview of your SHI support team.

Global Availability

Office 365 Support & Managed Services are available to SHI customers in all Office 365 public regions. Note that all global support is provided in English. If leveraging Office 365 via the Cloud Solution Provider program, then services are only available in United States and Canada.

Service Offers

Office 365 Support & Managed Services from SHI provides customers with multiple choices for supporting or managing their Office 365 environment, allowing the choice and control to remain with the customer.

Basic

Our Basic support package is the foundation of our Cloud service offers enabling customers to purchase their Office 365 services from SHI under the Microsoft Cloud Solution Provider program. Purchasing your Office 365 services through SHI has many benefits that are included in our Basic service level including:

- Access to our SHI One Cloud Management Platform for supported services
- Net payment terms provided (upon credit approval) through SHI so you're not running your entire business on a credit card (or keep it on a credit card through SHI)
- Access to Office 365 Partner funding programs
- Simplified billing enabling simple monthly invoicing with custom bill splitting and chargeback processing
- Access to a wide array of fee-based Office 365 professional and managed services
- Flexible support options (direct support from SHI with managed escalations back to Microsoft)
- Escalations to Office 365 engineers, if required, through SHI's Premier Support for Partners Agreement

Managed

The Managed service level is designed for customers who need comprehensive 24x7 management, alerting, and incident response for their environment, with SLA's as low as 30 minutes.

The Managed service level includes all the services of Basic and provides total 24x7 operational support for your Office 365 environment and includes additional services such as monitoring and optionally backup.

- All features of the Basic service level
- Onboarding program to provide configuration recommendations and to establish a best practice configuration baseline
- Unlimited break/fix and day to day service requests for the following:
    - Guided initial Active Directory configuration or access to project resources.
    - User modifications including setting up mailboxes, file storage and licenses.
    - Service configuration modifications.
    - Office 365 policy modifications.
    - Security & Distribution modifications.
    - Custom Domain modifications.
    - Application of company branding.
    - Desk-to-Desk troubleshooting and managed escalation to Microsoft.
- Regular account reviews to ensure best practice Office 365 tenant configuration and security posture.
- Best practice configuration of Office 365 services
- Unlimited managed cloud backup of Exchange Online, OneDrive for Business and SharePoint Online data. Backup services are included as part of an add-on bundle.

Service Comparison

Services	Basic	Managed
Simplified Billing & Billing Support SHI can tailor your cloud invoicing process to be aligned to your business requirements. Examples include splitting invoices for chargeback or accounting purpose, consolidating and summarizing invoices.	✔	✔
SHI One Portal Access Access to SHI's Cloud Management Portal, SHI One, which includes visibility and management of cloud support requests and your cloud accounts.	✔	✔
Cloud Adoption Support Resources to help you along your cloud adoption journey – includes onboarding assistance, best practices, helping your organization understand your cloud bill, and more.	✔	✔
Self-Service Technical Support 24x7 access to documentation, white papers and reference architectures for your cloud platform.	✔	✔
Office 365 Platform Support (Level 1 Engineering) Phone, email and ticketing access to support engineers for technical support for cloud services. Support includes unlimited cases with managed escalation back to the cloud provider as necessary.	✔	✔
Office 365 Platform Support (Level 2-3 Engineering) Phone, email and ticketing access to support engineers for technical support for cloud services. Support includes unlimited cases with managed escalation back to the cloud provider as necessary.		✔
Office 365 Service Management Unlimited break/fix and day to day service requests for the following: Guided initial Active Directory configuration or access to project resources. User modifications including setting up mailboxes, file storage and licenses. Service configuration modifications. Office 365 policy modifications. Security & Distribution modifications. Custom Domain modifications. Application of company branding. Desk-to-Desk troubleshooting and managed escalation to Microsoft		✔
Management & Monitoring Includes definition of runbooks for proactive management and reactive response to alerts within SLAs. For any reactive alerts includes initial troubleshooting and execution of escalation plan.		✔
Reporting & Account Management Monthly reports with account reviews every 6 months.		✔
Office 365 Backup Unlimited managed cloud backup of Exchange Online, OneDrive for Business and SharePoint Online data. Backup se rvices are included as part of an add-on bundle.		Optional Add-On

Your SHI Support Team

Account Executive

Your account executive:

- Manages the overall relationship between you and SHI
- Ensures all business transactions are of mutual value and conducted according to sound governance practices
- Acts as an escalation point for any potential customer satisfaction opportunities
- Facilitates the procurement of any contracts required (upgrades, replacements, and remediation) that is outside of the scope of the service level of managed services

Service Desk

Supporting the service desk is a team of certified, highly trained, and experienced cloud engineers who perform remote diagnosis and provide level 1, 2 and 3 support for SHI services based upon the agreed service level.

The service desks, located in Somerset, New Jersey and Austin, Texas:

- Provides service interface between you and SHI for all aspects of your service, including receiving, recording, coordinating, and escalating incidents, changes, and requests
- Provide general guidance via standard documentation, white papers and reference architectures upon request
- Work closely with customers to resolve incidents and problems within the agreed service levels.
- Provides a world-class service experience
- Facilitates escalations to the level 2 and level 3 technical support resources as necessary
- Facilitates escalations to the billing and account management teams as necessary
- Acts as the initial point of contact for non-technical account management requests such as adding/removing subscriptions

Escalation Manager

Your Escalation Manager:

- Assists with technical troubleshooting to resolve incidents
- Plays an active role in ensuring that service agreements are met
- Acts as a point of contact for escalations by or for the customer

How to Request Support

Log an incident, change, or request with the service desk using one of the options below.

Option 1: Log a request online
You may log in via the SHI One Management Portal by visiting https://one.shi.com.

Option 2: Log a request by telephone
Call the service desk and refer to the customer instructions (also below).

Option 3: Log a request by email
Email the service desk and refer to the customer instructions (also below). All tickets submitted via email are created as Low priority, please call the service desk to escalate if necessary or submit via the SHI One Management Portal.

Once a record has been created, you'll be provided with a reference ticket number for tracking progress and making further inquiries. The person contacting our service desk must have a suitable knowledge of the service and configuration items to enable us to provide efficient diagnosis, support, and resolution.

Customer Instructions

The service desk will prompt you for the following information. Please ensure you have all relevant details ready:

- Your Organization's Name
- Your Contact Name, Email and Phone Number

For cloud services as well as support and managed services you may be asked to provide the following information:

- Resource name, resource ID, IP address, or account number
- Details of the incident, change, or request
- Urgency and impact of the issue (determines request priority)
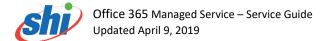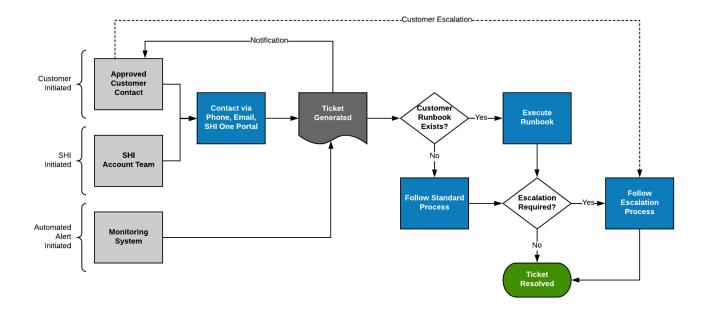- Ticket number (if previously logged)

Contact information

Phone: 1-888-572-9712
Email: SupportServices@shi.com
Self-Service Portal: https://one.shi.com

Request flow

Service requests submitted by the Customer will follow the path outlined below. If a Customer Runbook has not been created for the request or issue, then a Standard Process will be followed. Our Standard Process covers requests for information and basic service troubleshooting.

Managing your Service

Important Processes

Onboarding

For SHI to provide the complete set of services available under the selected service level it is critically important that the Onboarding process be performed with precision and detail. The depth of onboarding varies based on service level.

- For Basic Service Level
  - o Ensure customer understands how to request support and what support is entitled under the current service level
  - o Ensure customer understands escalation process
  - o Ensure customer can access the SHI One Portal
- For Managed Service Level
  - o All steps under Basic
  - o Ensure SHI has all necessary access to systems to provide agreed upon level of service
  - o Work with customer to prepare the Customer Service Runbook
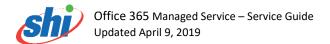 - o Implement monitoring and backups as agreed upon in the Customer Service Runbook

Request access to the SHI One Management Portal

1. Visit https://one.shi.com
2. Click "Don't have a login? Register an account" or optionally sign in with one of the SSO services supported.
3. Enter your email address and generate a password. Note your email address must match your organization domain and cannot be a public email such as gmail.com or outlook.com. Additionally, if you're the contract owner please use the same email that was used during the initial service onboarding form.
4. Verify your email address by clicking the link in the email you received.
5. Next you must be approved by your account administrator, if you are the account administrator and you receive an approval screen then contact the Service Desk for assistance with configuring your initial account administrator
6. Provide any contact information on your profile as requested.

If you have a Technical Account Manager, they can walk you through this process.

Change your list of approved administrators and users

1. Ask each of your users to request access to the self-service portal using the process described above.

2. As the administrator you will be asked to approve each user as they register for the self-service portal, you may assign them as either a User or an Administrator. Users can later be configured with specific Roles. Administrators have full control over the portal.
3. Your list of users can be managed by visiting https://one.shi.com
4. Click on your initials in the top right and select Organization Settings.
5. Click "User Management".
6. Select the user and modify their role or remove them as needed.

If you have a Technical Account Manager, they can walk you through this process.

SHI Access Requirements

For any service level where the customer is invoicing their Office 365 and services through SHI via the Cloud Solution Provider Program we require the Office 365 account to be configured in the following way:

- SHI maintain access to the customer's Office 365 license information via the Microsoft Partner Center

To ensure SHI's ability to provide the services required under the Managed tier the following access must be provided to SHI by customer:

- Configuration of appropriate access to all supported Office 365 Tenants
- Configuration of SHI Monitoring Solution
- Active Directory Account Access

Escalations

The escalation process is used to highlight or flag certain issues within SHI to allow the appropriate personnel to respond to these situations and monitor the resolution, ensuring that unresolved problems don't linger, and issues are promptly addressed.

If an issue is not being processed to your satisfaction, call the service desk assigned to your request and follow the instructions below:

1. Provide your organization's name
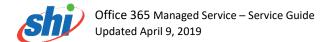2. Provide the ticket number
3. Ask to speak to the escalation manager

Escalation levels

The following table provides details around escalation levels and contact points:

Escalation Level	Scenarios	Who to Contact	Contact Method
Level 1	Impending SLA breach: • A logged incident is not progressing to your expectation • No response to customer from assigned resource within the time required • Failure to act on agreed activities • No follow up on a ticket	Escalation Manager	Contact the Service Desk via telephone or email and ask to speak to the Escalation Manager
Level 2	If you are not satisfied with the results from a level 1 escalation you may escalate to your Account Executive during business hours. Generally this includes: • Financial-related issues • Concerns or issues related to the escalation process	Account Executive	Contact your SHI Account Executive directly. If you do not know who your Account Executive is, contact the Service Desk to request that information

Office 365 Support Escalations

If you are purchasing your Office 365 through SHI and on our Basic service level as part of the Cloud Solution Provider Program or are leveraging our Managed service levels, then SHI serves as your sole point of contact for supporting that account. If Microsoft ever needs to be contacted for technical escalations, SHI will do so on your behalf by leveraging our Premier Support for Partners agreement.

Managed Services Operations

Customer Service Runbooks (Managed Service Level only)

During the onboarding process, the SHI Services Representative will work with the customer to co-develop a customized support runbook to cover the management of the Cloud environment. This runbook will be used for the ongoing support of the environment, including any known incident response items, call routing and escalation points as needed to service any critical alerts during our 24x7 monitoring.

Examples of the details included in the Customer Support runbook include:

- Detailed application information, including SME's and owners
- Approved customer contacts
- RACI chart that covers SHI and Customer roles
- Service levels & response times on a per-application basis
- Known application remediation paths / known issues (Recurring environmental issues, etc.)
- Login details & procedures for the environment
- Call-tree for critical issues, including escalations

Development of the Customer Service runbook is critical to the success of ongoing operations, and as such will need to be as comprehensive as possible. Applications, alerts, or services not covered by the Customer Service runbook will be considered a best-effort service level. During our monthly account review process, any alerts not covered by the runbook should be considered for addition.

Monitoring (Managed Service Level only)

SHI will respond to any Office 365 Tenant related outage, service issue or security alert including managed escalation to Microsoft.

Incident & Problem Management (Managed Service Levels only)

SHI's primary objective during disruptive incidents is the timely restoration of service and customer satisfaction. Under our Managed Service Level SHI's best-in-class alerting and monitoring system may have already created a ticket for critical service disruption, however Incidents can also be initiated by named contacts or SHI on the customer behalf.

Here's an outline of the SHI Incident & Problem Management process:

1. All incidents are logged as tickets via the ticketing system (see requesting support) or for the best possible experience through the SHI One Portal (https://one.shi.com).
2. Prior to assignment, SHI support will carefully review our knowledge base and the Customer Support runbook if applicable.
3. If an engineer is unable resolve an issue within a timely manner, they may escalate the issue up to and including the Public Cloud provider, or Vendor.
   a. **Please Note**: escalation may require the customer to have the appropriate support agreements in place with Vendors. We recommend documenting which Vendors SHI engineers can engage on the customer behalf as part of the Customer Support runbook, and SHI will follow any required Vendor process to be "authorized" to open tickets on the customer behalf.
4. During a critical situation, SHI engineers will work to restore service as quickly as possible, and document steps performed to a ticket for change tracking purposes. However, if the resolution will affect other services, the customer will be advised and have the option to schedule the work during a maintenance window.
5. An incident is closed:
   a. With customer approval
   b. Automatically resolved based on metrics
   c. Closed on behalf of the customer after three attempts to communicate with customer over 72 hours
   d. When Cloud provider has identified a platform limitation restricting the otherwise successful resolution of the incident

Infrastructure Management (Managed Service Level only)

Backups
Unlimited managed cloud backup of Exchange Online, OneDrive for Business and SharePoint Online data. Backup services are included as part of an add-on bundle.

Office 365 Service Requests
For customers at our Managed service level, SHI's certified engineers will make configuration changes to your Office 365 environment, either using our library of templates designed by our certified architects, or the customer's standard deployment templates, per request. The configuration and deployment of resources will follow the Customer Service runbook, and the change control procedures described in this document. Certain limitations may apply with Marketplace applications, including applications that require entering in to agreements with 3rd party providers, and external billing. Design of new deployment templates would be additional cost and treated as a professional service.

Unlimited break/fix and day to day service requests for the following:
- Guided initial Active Directory configuration or access to project resources.
- User modifications including setting up mailboxes, file storage and licenses.
- Service configuration modifications.
- Office 365 policy modifications.
- Security & Distribution modifications.
- Custom Domain modifications.
- Application of company branding.
- Desk-to-Desk troubleshooting and managed escalation to Microsoft.

Change Management
Change management includes a standardized set of procedures that enables SHI to deliver changes in an organized manner to help ensure minimum impact and to meet any governance or compliance requirements for environment modifications.

The Service Desk should be your first point of contact on all changes to the environment.
1. All changes will be managed through a ticket, preferably through the SHI One Portal, as this allows for proper historical tracking.
2. SHI will create a ticket for changes that are owned or initiated by SHI. Customers may also elect to create tickets when SHI support is required for any changes owned and initiated by the customer. In addition, the customer may also call our support line and request that a ticket be created.
3. SHI will engage the appropriate engineers and perform the change, keeping the customer fully informed on progress.
4. For changes the customer may perform on their own environment that may cause disruption to any monitored resources, the customer must raise a ticket with SHI to inform us of the pending maintenance with a minimum 24-hour notice.

Service Reporting (Managed Level only)
SHI provides regular reporting as part of our Managed Service practice. During the review, your SHI Services representative will review the current state of your Office 365 environment, including spend, service performance, and any proactive measures that need to be taken. They will also review any tickets opened during the previous month and provide any status updates on future-state goals & roadmap. Additionally, any other key items that may come up will also be discussed.

After the initial onboarding phase the meeting cadence may include:
- **First Meeting** – Review of architecture and uptime & SLA requirements; review of end-state architecture roadmap. Review of any immediate changes required to meet uptime & performance SLA's; Review any immediate proactive cost control measures; review of Governance & Security goals; review of Office 365 recommendations.
- **Semi-Annual Review** – Overall review of service delivery during the period (tickets opened, license utilization, any proactive changes needed to get ahead of customer objectives). Status of goals & objectives and how we tracked toward it; Review of SLA & uptime during the year.

Response Times and Service Level Agreements

Below are our standard SLA's for each service level and ticket severity. This SLA is for the initial response and assignment of the ticket and does not guarantee resolution to any incident or ticket within this timeframe.

Service	Basic	Managed
Service Desk (Technical Support)	Self-service portal available 24x7	Available: 24x7 Low: 8 hours Medium: 4 hours High: 2 hours Critical: 30 minutes
Billing Support	Available: Business hours Low: 8 business hours	Available: Business hours Low: 8 business hours
Account Management	Available: Business hours Low: 8 business hours	Available: Business hours Low: 8 business hours

Severity Level	Description
Low	Customer is requesting general guidance such as a "How To" information request or support for a billing issue.
Medium	The situation has minimal business impact. The issue is important but does not have a significant current service or productivity impact for the customer. A user or small number of users are experiencing partial disruption, but an acceptable workaround exists.
High	The service is usable but in an impaired fashion. The situation has moderate business impact and can be dealt with during business hours. A user or small number of users, customer, or service is partially affected.
Critical	One or more services aren't accessible or are unusable. Production, operations, or deployment deadlines are severely affected, or there will be a severe impact on production or profitability. Multiple users or services are affected.

Service Limitations

The following items are to be considered out of scope for all service levels defined in this document and would require a separate statement of work.

- Migrations of new workloads into the managed Office 365 environment (Ex: Email or File).
- Platform migrations between one Office 365 service to another (Ex: OneDrive to Teams)
- Modifications of environment that fundamentally modify the architecture of the applications.
- Any project request that result in major infrastructure changes such as mergers/acquisitions, deployment of new services, tenant migration, directory synchronization
- All work to be completed remotely. On-site support available for an additional cost.

Supported Services

Customers of Support & Managed Cloud Services can select from the product groups listed below to build their hosted Infrastructure. SHI provides best practice opinions around the product set.
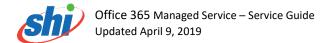
BELOW ARE THE SUPPORTED OFFICE 365 SERVICES:
Note: Some products listed below may be subject to different terms, conditions, service level agreements and levels of support.

General Support: SHI has support expertise and has developed specific support services.
Best Effort: Reasonable activities undertaken to resolve issues but with no guarantee of resolution.
Escalation to internal staff and Cloud Provider as needed.

Customers can deploy resources outside the list documented below; however, SHI does not claim deep expertise in these areas. SHI support can be engaged for special escalation scenarios; however, support may be limited.

Any Office 365 feature or service not listed below is considered Best Effort.

Service	Best Effort	General Support
Office Applications		
Microsoft Word		✓
Microsoft Excel		✓
Microsoft PowePoint		✓
Microsoft OneNote		✓
Microsoft Outlook		✓
Microsoft Publisher		✓
Microsoft Access		✓
Skype for Business		✓
OneDrive for Business		✓
Windows 8 Apps		✓
Office for Mac for Office 365		✓
Office Mobile for iPad/iPhone		✓
Office Mobile for Android		✓
Office 365 Online Services		
Exchange Online		✓
OneDrive for Business		✓
SharePoint Online		✓
Skype for Business Online		✓
Project Online	✓	
Visio Online		✓
Office Delve		✓
Microsoft Flow	✓	
Office 365 Video		✓
Microsoft Teams		✓
Microsoft Planner		✓
Microsoft PowerApps	✓	
Microsoft Forms		✓
Microsoft Bookings	✓	
Microsoft Kaizala	✓	
Microsoft Stream	✓	
Microsoft StaffHub	✓	
Microsoft Sway		
Yammer		✓
Security Services		
Advanced Threat Protection		✓
Secure Score		✓
Analytics Services		
Workplace Analytics		✓
MyAnalytics	✓	

Power BI	✓	

Important Links

Cloud Service Agreement

Find more information about our cloud services, including the service description, legal content, acceptable use policy, third party software terms, minimum requirements, and more.

View details

SHI One Management Portal

The service portal enables approved users to log and track service requests as well as interact with many self-service capabilities related to the service.

Visit portal