

Onboarding Doxis ICA Managed Services



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1 Doxis ICA Service Bundle

Welcome from the SER Managed Service Team. We are pleased that you have decided on a Doxis ICA Service Bundle and would like to provide you with some information on how to proceed and also describe the cooperation services on your side. This will enable us to establish the full scope of services for you as quickly as possible.

This guide contains various options, not all of which may apply to you. These are the distinctions between a system that is hosted on-premise at your premises or in the cloud at SER. A distinction is also made between the Silver, Gold and Platinum service bundles with the corresponding services.

An overview of the open tasks can be found on the last page of this document.

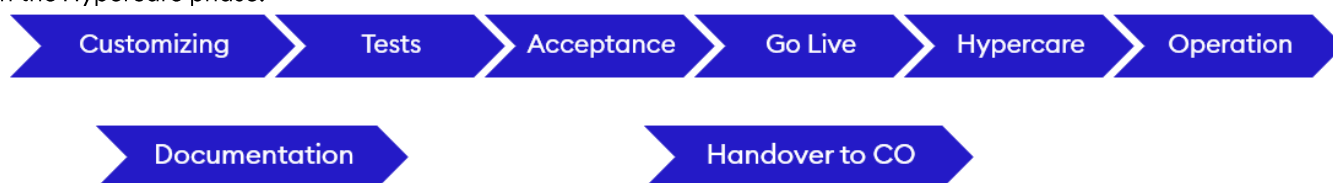
2 Preparations

If you already have a productive Doxis environment, we must first check the requirements for taking over the administration in accordance with the service description. To do this, we need the documentation for the Doxis applications and the Doxis server infrastructure from you in order to compare this with our support database.

If you have developed a lot of the system yourself or had it developed, we need the documentation for agents, FIPS jobs or interfaces. This applies to the Gold and Platinum Bundle.

If you are still in the project phase of creating a new Doxis application, we can prepare a lot of things now to ensure a smooth transition into operation.

This includes handing over the developments and documentation to SER's Customer Operations Team (CO). This should take place after your tests, acceptance and creation of the documentation and be scheduled for the go-live, at the latest in the Hypercare phase.



3 Contact form

So that we can activate you and your colleagues for the mentoring modules and the SERviceDesk, we would like to ask you to complete the enclosed form and send it back to managed-services@sergroup.com.

The persons registered in the upper section receive access to the mentoring services in our eLearning portal. Silver customers are entitled to one free access, gold customers three and platinum customers 10 accesses.

SER

Kundenname: _____ SER Vertragsnummer: _____ Datum: _____
 ausgefüllt von: _____

Herzlich Willkommen im Managed Service der SER Gruppe. Vielen Dank für Ihr Vertrauen in unsere Produkte und Dienstleistungen.

Wir freuen uns sehr, dass Sie zukünftig unsere Leistungen im Rahmen eines Doxis Intelligent Content Automation Service Bundles in Anspruch nehmen werden. Um Ihnen und Ihren Mitarbeiter*innen unsere Leistungen im Rahmen des vereinbarten Service Bundles zur Verfügung zu stellen, benötigen wir einige Kontaktdaten Ihrer Mitarbeiter*innen, um die entsprechenden Zugänge zu unseren Systemen einrichten zu können. Bitte senden Sie uns das ausgefüllte Formular als PDF an managed-services@sergroup.com zurück. Für die Doxis ICA Service Bundle Mentoring Services der SER stehen Ihnen im Silber Paket ein Zugang, im Gold Paket drei und im Platin Paket zehn Zugänge für Ihre Mitarbeiter*innen zur Verfügung.

Die folgenden Personen werden die Doxis ICA Service Bundle Mentoring Services der SER in Anspruch nehmen:

Service Bundle*	Name	Vorname	E-Mail-Adresse	Telefonnummer	Mobilnummer	Stelle in Ihrem Unternehmen

Die folgenden Personen werden im Rahmen der Nutzung der SER Produkte mit dem SERviceDesk kommunizieren:

Name	Vorname	E-Mail-Adresse	Telefonnummer	Mobilnummer	Stelle in Ihrem Unternehmen	Haupt AP

Bitte kennzeichnen Sie uns den Hauptansprechpartner (Haupt AP) bei Ihnen, den wir für die Unterstützung bei der Ticketbearbeitung, für Auskünfte und allgemeine Rückfragen kontaktieren können.

Hinweis: Die hier erhobenen Daten sind zur Erfüllung der vertraglichen Verpflichtungen erforderlich.
☐ Hiermit wird bestätigt, dass die hier genannten Personen über die Benennung als Ansprechpartner*in informiert worden sind.

Zur Erfüllung unserer Managed Service Aufgaben, benötigen SER Mitarbeiter direkten und unabhängigen Zugang zum Doxis System. Die aktuelle Liste fügen wir im separat bei.

*) Service Bundles: Silber, Gold, Platin

Version 3.0

3.1 Mentoring (upper table)

After you have sent us the list of your contacts, we will set up your accesses for Doxis ICA Service **Mentoring** and **SERviceDesk**.

For the mentoring services, the registered persons then receive an e-mail with the title "[SER LearningCube] and the access data for the SER learning platform" with the link to the eLearning:

<https://elearning.ser.de>

Please also check your SPAM folder.



If you already have access through participation in a training course, the area will only be expanded and you will find the mentoring content directly after you have logged in with the known login data.

Self-learning courses included in the ICA subscription

As an ICA customer, you have exclusive access to selected self-learning courses. Learn more about these courses here. Use the buttons to access the respective registration courses. Follow the instructions there and send us the desired start date of your self-study course.

3.2 Service Desk (lower table)

In addition, the colleagues entered in the list below receive access to the SERviceDesk portal via <https://servicedesk.ser-group.com>

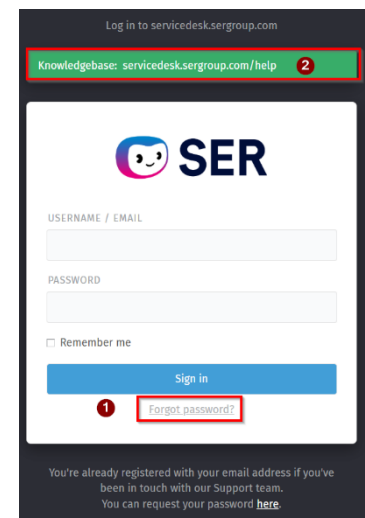
With "Forgot password" (1) you can set your password and via the green link "Knowledgebase: <https://servicedesk.ser-group.com/help>" (2) you will find a short documentation for the ticket system (2).

In future, communication between you and our SERviceDesk and Managed Services teams will always take place via our ticket system. This ensures that all activities on your Doxis ICA system are properly documented.

As soon as your accesses have been set up in our ticket system, you will receive the first tickets for the following activities:

- To vote for the Zabbix agents
- To transfer and set up the new Doxis ICA licenses.

Please remember to change the passwords of the Superadmin and Supervisor users so that these users remain under your control.



A SERVICE Desk ticket should contain the following information:

1. Select component and product
2. Add problem description
3. Attach screenshots
4. Set ticket information
5. Specify additional information

3.2.1 Detailed instructions for creating SERVICE-Desk tickets

If you have a problem with the operation of Doxis in production, you can create a ticket.

Please direct project requests to the relevant project team. Specialist configuration requests or user administration are the responsibility of your specialist administration.

1. select component and product

- **Affected component:** Specify which specific component is affected (e.g. storage problem, search problem, storage environment).
- **Product and version:** Select the product that is affected and the version used. If the product is not in the list, you can enter the product name manually. If the product does not appear, please enter it in writing in the ticket.

2. description of the problem

- **Detailed description:** Describe the problem as precisely as possible. Important questions that should be answered:
 - Where exactly does the problem occur?
 - How long has the problem existed?
 - Has the function existed for a long time or has it only recently been implemented?
 - Do you have a specific version with which the problem occurs?
 - Has there been a recent system change or adjustments to the system?
 - Has an update been installed? If so, who was involved in the update?

3. screenshots

- Add one or more screenshots that illustrate the problem. This helps the team to better understand the problem.
- Ideally, the screenshot should include the entire screen.
- Screenshots from a cell phone are unfortunately not permitted.

4. ticket information

- **Title:** Choose a concise title that describes the problem. Enter the relevant keyword and, if available, your own internal ticket number.
- **Priority:** Set the priority of the ticket yourself.
 - **Note:** Tickets submitted by e-mail have priority 3 by default. For a higher priority or urgent requests, please use the ticket system directly.
- **Ticket type:** Select the appropriate ticket type (e.g. Change Request, Service Request or Incident).
 - **Note:** Please ensure that the ticket type is correct, as this has an influence on further processing.

5. additional information

- **Dump and logs:** Your specialist administrator/Doxis representative should be able to set a dump in the registry if this is necessary for problem analysis, as well as have access to the servers.
- **Comparable tickets:** If there are similar tickets that have been submitted previously, link to them.

6. submit ticket

- **Via the ticket system:** Always submit the ticket via the **Zammad/SERviceDesk** ticket system to ensure the fastest possible processing.
- **By e-mail:** If you submit the ticket by email, make sure you use relevant keywords in the subject and text. Please note that emails are always assigned priority 3 in the SERvice Desk.

3.2.2 Contact SERviceDesk

To get in touch with us, you can find an overview of the contact details for our SERviceDesk and Managed Services teams here:

Accessibility

- **Ticket system:** The ticket system is available to you 24/7
- **by telephone:** Mon - Fri from 06:30 to 18:00: +49 228 90896 300
Outside these times: +49 (0)228-90896 555

E-mail and ticket system

- Ticket system: <https://servicedesk.sergroup.com/>
- E-mail: servicedesk@sergroup.com
- Hotline number DE-Inland: 0 800 119 840 0
- Hotline number from Germany and abroad: +49 228 90896 300
- Hotline number outside the above times: +49 (0)228-90896 555

4 Access to your system by SER employees

Direct and independent access to the Doxis ICA customer system via remote access tools is essential for the fulfillment of the SLAs concluded in your contract in the **Gold and Platinum Bundle**. On the Doxis servers, we need sufficient rights to start and stop services and access to the Doxis database (DB) as well as a login to the DB.

A current list of colleagues from the SERviceDesk and Managed Services teams for whom we require this unattended access to your Doxis system in the **Gold/Platinum Bundle** is attached to this guide.

Cloud:

Support staff are automatically given access to the cloud system. You receive a list of employees for your documentation.

On-Premises:

Please give employees from SERviceDesk and Managed Service access to your Doxis environment.

Please create a support user for us.

Please provide instructions on how to access your system.

Inform us before access emails are sent and let us know what they look like.

As soon as you have access to the ticket system, we will document everything else there.

Please let us know when these accesses have been created.

Please send us documentation on how you set up and use remote maintenance access.

If employees receive individualized emails, e.g. to obtain two-factor authentication, please inform us in advance with the following information:

Which sender address is used?

What is the content of the e-mail?

This may be necessary to distinguish them from phishing emails.

Please name a direct contact person with whom the accesses can be tested.

With a SER Cloud installation, we set up users in your Doxis environment. Technical licences are used so that the users are not charged to your licence volume. You may receive a correspondingly extended Doxis ICA licence.

To record our administrative activities in your Doxis environment, we can activate the audit trail function if it has not been activated before.

4.1 Production keywords

If you have not already done so, please change the production passwords for Supervisor and SuperAdmin and do not pass them on to SER employees. SER employees work with personalized Doxis accesses.

5 Licenses

If you already have a Doxis system in operation, you will receive updated DOXIS ICA licenses. Please activate these in all systems. If you need assistance with this, the Managed Services team will be happy to help. The request is made via a ticket.

6 Zabbix agents

As part of the Doxis ICA service bundles, we use 24/7 monitoring with Zabbix monitoring agents. For OnPremises systems, we require port sharing on your firewall so that all Doxis servers can communicate with our monitoring server at the URL monitoring.sergroup.com (IP address 62.225.156.139) via TCP port 10051. We use the Zabbix Agents2 for monitoring. You can find further information at: https://www.zabbix.com/download_agents

Firewall activation:

Enable an outgoing connection from all Doxis servers to the SER Zabbix server monitoring.sergroup.com TCP port 10051.

Please report your maintenance windows to SER.

6.1 Maintenance window

If you have maintenance windows, please let us know so that we can enter them in the Zabbix server. This applies to regular maintenance windows, but also if you want to shut down the Doxis server for updates, production setups, etc.

7 Doxis Business Studio

Doxis Business Studio is the integrated no-code development environment for IT-savvy users. "Citizen developers can use it to make simple adjustments themselves, integrate external systems, create users and user groups and assign authorizations. Customizations made in Doxis Business Studio can be seamlessly integrated into the individual Doxis solutions. Another component of Doxis Business Studio is the Fast Starter library with a wide range of preconfigured, ready-to-use content apps.

In the LearningCube you will find the following introduction [SER learningCube: Release updates as eLearning](#)

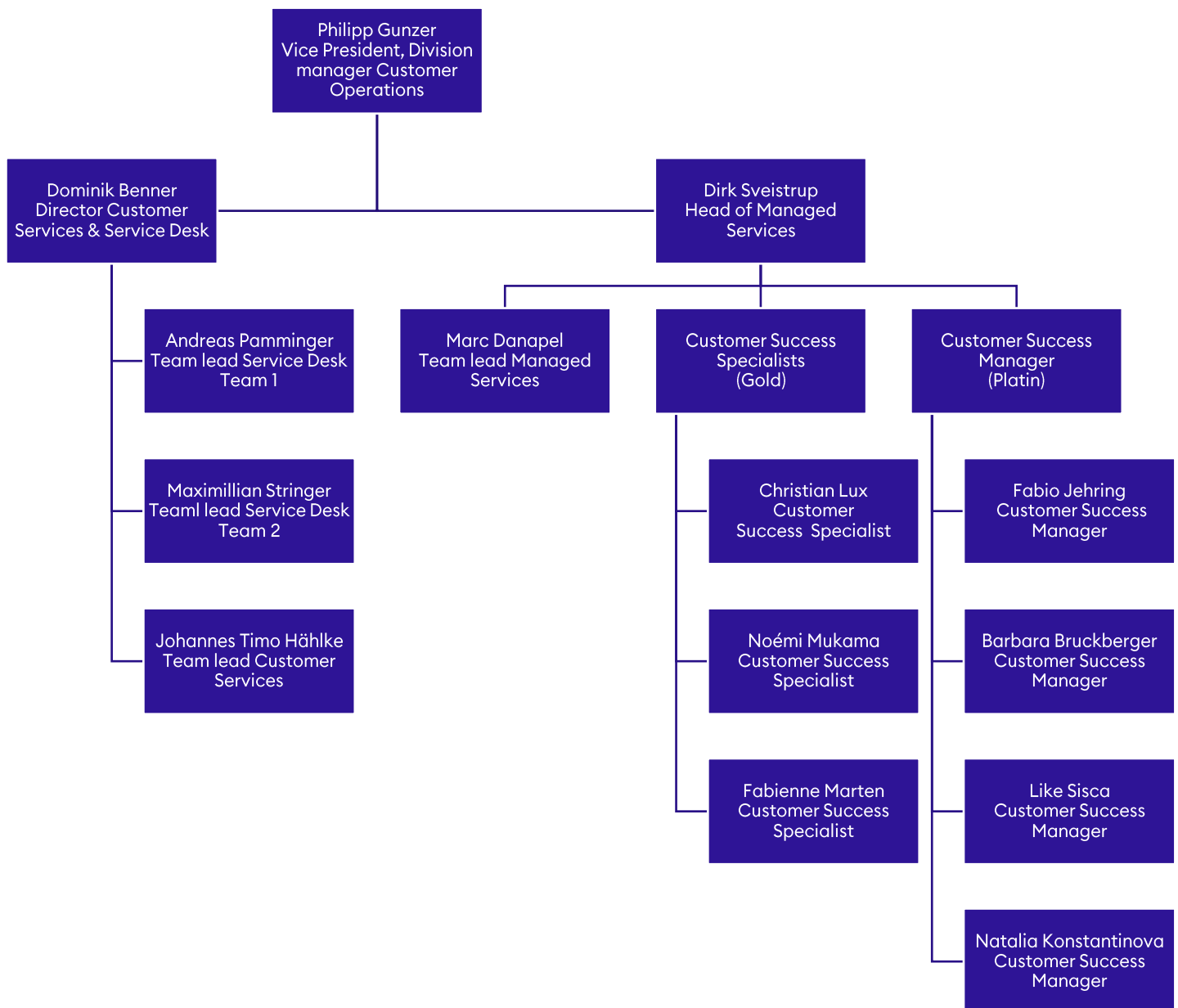
8 SER contact person

If you have any commercial questions, please get in touch with the contact person you know from our customer order processing or sales department.

For ongoing projects that are implemented by our Professional Service, appropriate documentation and a takeover by the Customer Operations department is required. These projects are not affected by your switch to a Doxis ICA contract.

If you have any other questions or comments, you can contact our central mailbox (customer-success@sergroup.com) if you are a gold customer or your responsible Customer Success Manager if you are a platinum customer. They will be happy to help you at any time.

8.1 Organizational structure of the Customer Operation



9 Further activities

As part of the Doxis ICA Gold or Platinum Bundle, you are entitled to an annual performance workshop. We will create a ticket in good time to arrange an appointment. If you would like to discuss your own topics on this subject, we will be happy to include them.

The same applies to the Update Service.

	On Premise Gold/Platinum	Cloud Gold/Platinum
Do you already have a Doxis environment?	Please send us documentation on agents, FIPS jobs or interfaces	
Update Service, Performance and Knowledge Share Workshop	We will coordinate this with you.	We will coordinate this with you.
Contact form	Please send us the completed form to get access to the Service Desk and Mentoring Service	Please send us the completed form to get access to the Service Desk and Mentoring Service
SER employee access to your system	Please set up access for our SER employees. We also need instructions on how to log in to your system.	We need a release from you that we may create the accesses
Maintenance window	Notification of regular or individual downtimes	
Zabbix agents	Enable an outgoing connection from all Doxis servers to the SER Zabbix server monitoring.sergroup.com TCP port 10051	Enable an outgoing connection from all Doxis servers to the SER Zabbix server monitoring.sergroup.com TCP port 10051

