



# Customer Support Manual

Compass® SaaS Delivery & Support Model

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Cobalt Iron, Inc.

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## Welcome to Compass

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Thank you for selecting Cobalt Iron Compass as the solution for your enterprise data protection. As the global leader in analytics-driven, cyber-resilient data protection, Cobalt Iron is dedicated to making your experience with the Cobalt Iron Support team a positive one in every regard.

This manual explains the world-class support provided by the Cobalt Iron Support team and how Compass® delivers data protection infrastructure and support as a secure, SaaS-managed platform. It is a quick reference to:

- What Compass is and how the SaaS delivery model works
- Incident reporting and the support ticketing process
- Incident priority levels and support goals
- Support hours, including coverage across global time zones
- The ticket escalation process
- Solution elements in scope and out of scope
- Customer responsibilities
- Ad-hoc and special-event activities, including after-hours requests

Share this document with individuals or departments that may need to open an incident case with Cobalt Iron.

Thank you for your business.

Sincerely,

*David Nicholson*

**David Nicholson**

Vice President of Customer Enablement  
Cobalt Iron, Inc.

# Compass® and the SaaS Delivery Model

Compass is a cyber-resilient platform focused on the protection of your data. Regardless of the size or complexity of your organization, Compass provides advanced, multilayered security, simplified infrastructure management, and SaaS delivery that adapts to your environment. Understanding how Compass is delivered is the foundation for everything else in this manual.

## Key Capabilities

- **Single Pane of Glass.** A single, unified experience for orchestrating multicloud backup infrastructure and operations across on-premises data centers, remote offices, and cloud hyperscalers.
- **Security & Cyber Attack Detection.** Compass monitors metrics, conditions, and events in your backup environment and analyzes them for indications of ransomware or other security attacks, alerting you immediately to anomalies so threats can be mitigated promptly.
- **Automated Software Updates.** Compass handles hardware and software installs, configuration, monitoring, cyber hardening, and patch maintenance for the backup server (Accelerator/Vault) automatically.
- **Zero Access®.** Zero Access eliminates logins and direct access to the backup environment, ensuring the security of your data protection infrastructure.

## SaaS Delivery vs. the Traditional Service-Provider Model

A central differentiator of Compass is how the backup infrastructure is managed. Compass SaaS automatically and securely manages the backup infrastructure on the customer's behalf. This is a deliberate departure from the historical approach, which depended on specialized skills or a service provider to manage the backup server infrastructure and software directly.

In the traditional model, many people held standing access to the backup server infrastructure. Ad-hoc requests could be accommodated with little planning — even on short notice or outside business hours — because teams of operators held standing access. While convenient, that broadly held access represented a significant security risk: every credentialed administrator was a potential attack surface, and unplanned access came at the cost of a larger, harder-to-govern threat perimeter.

Through Zero Access and automated, SaaS-managed operations, Compass hardens the backup environment against exactly this risk: there are no standing logins into the backup infrastructure for teams of operators to use. The trade-off is intentional — stronger security in exchange for a structured, planned process for the special activities that previously relied on open access. The rest of this manual describes that process.

| Traditional Service-Provider Model                                   | Compass SaaS Model                                                   |
|----------------------------------------------------------------------|----------------------------------------------------------------------|
| Service provider manages servers and backup software directly        | Compass automatically and securely manages the backup infrastructure |
| Many people hold standing access to the backup infrastructure        | Zero Access® — no standing logins into the backup environment        |
| Ad-hoc requests accommodated with little planning, any hour          | Special activities handled through a structured, scheduled process   |
| Convenient, but a significant security risk and large attack surface | Hardened security posture with a minimized attack surface            |

| Traditional Service-Provider Model                              | Compass SaaS Model                                          |
|-----------------------------------------------------------------|-------------------------------------------------------------|
| Patching, hardening, and maintenance handled manually by people | Automated software updates, monitoring, and cyber hardening |

# Regions of Responsibility

Compass divides accountability into clear regions of responsibility so everyone knows who owns what. The customer manages data protection policy and operations, Compass securely delivers and maintains the backup infrastructure, and the Cobalt Iron Support team assists with remediation, configuration, and guidance. The graphic below summarizes how these responsibilities are shared; the detail is defined later under Scope of Services & Responsibilities.

## Regions of Responsibility

| Customer                                                                                                                                                                                                                                | Delivered by Compass                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <br>Data Protection                                                                                                                                    | <br>Compass Vaults                                                                                                                                                           | <br>Compass Analytics<br>Engine Management & Automation                                                                                                                                                               |
| Customer Managed                                                                                                                                                                                                                        | SaaS Delivered                                                                                                                                                                                                                                                | Support                                                                                                                                                                                                                                                                                                 |
| <ul style="list-style-type: none"><li>• Agent installation and configuration</li><li>• Investigate and resolve backup failure</li><li>• Proficiency at performing restores</li><li>• Disaster recovery planning and execution</li></ul> | <ul style="list-style-type: none"><li>▪ Availability of backup and restore services</li><li>▪ Design and delivery of production-ready Vault</li><li>▪ Constant monitoring and maintenance of Vault platform</li><li>▪ Commander Dashboard Reporting</li></ul> | <ul style="list-style-type: none"><li>▪ Response and remediation of Vault issues</li><li>▪ Assist with Agent configuration</li><li>▪ Assist in resolving backup and restore issues</li><li>▪ Suggest helpful documentation resources for agent operation</li><li>▪ Vault updates and upgrades</li></ul> |

## Cobalt Iron Compass® Support

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Cobalt Iron Compass Support — included as part of the Compass solution — provides setup and problem-resolution assistance from highly trained Compass specialists via our ticketing system. Our Support team offers help with:

- Compass provisioning and reporting
- Agent installation and configuration
- Policies and options
- Agent operation fundamentals
- Agent error resolution
- Any issue with the Cobalt Iron Vaults (Accelerators) and associated storage

Compass Support is available live during normal business hours, Monday through Friday, 8:00 a.m. to 5:00 p.m. CT, excluding U.S. holidays. Tickets opened as Urgent priority are responded to 24x7x365, as are Compass monitoring alerts for isolation of problems and identification of faults or errors in the solution. See [Support Hours](#) and [Priority Levels](#) for details.

# Incident Reporting Process

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If you require assistance or are experiencing trouble with Compass, contact the Cobalt Iron Support team using one of these methods:

## **SUPPORT PORTAL**

<https://support.cobaltiron.com> (login required)

- Create new tickets (selectable priority)
- Update active tickets
- View closed tickets

## **EMAIL**

[cisupport@cobaltiron.com](mailto:cisupport@cobaltiron.com)

- Emails sent to this address create a new ticket automatically (Normal priority)

Every request is issued with a new ticket number, which is used as the identifier for the issue. All communication and information regarding the issue is tracked by this active ticket. Each time the ticket is updated, an email is sent to the requester and everyone on the CC list. Updates can be made in the Support Portal or by simply replying to the email.

To facilitate and expedite troubleshooting, please provide the following information in your Cobalt Iron Support ticket:

- Company name
- Name
- Phone number
- Email address
- Description of the problem
- Time the problem occurred
- Corrective actions already taken
- Any supporting client files (schedule or error logs, config or option files)

# Cobalt Iron Support Ticketing Process

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The goal of the ticketing process is to restore normal service as quickly as possible while minimizing the impact on business operations. The Cobalt Iron Support team manages communications, directs diagnostic activities, and provides feedback to the customer.

Support tickets arise in two distinct contexts. Recognizing which one applies clarifies how a ticket is opened and who drives the response.

## Compass-Detected Events (Cobalt Iron Initiated)

Compass continuously monitors your backup environment and infrastructure, and the Cobalt Iron Support team manages the events it detects. When an event impacts data protection services or requires customer assistance to investigate — for example, an Accelerator/Vault losing connectivity to the Cobalt Iron cloud — Cobalt Iron opens a case to inform you or to work it collaboratively, initiating and driving the response.

## Customer-Initiated Requests

Customers open tickets for issues they encounter or assistance they need — such as backup failures, agent errors, configuration and how-to questions, or ad-hoc support — submitted through the methods in the Incident Reporting Process. For backup failures, please perform initial triage before raising a ticket (see Customer Responsibilities).

## Common Ticket Lifecycle

However a ticket originates, it follows the same lifecycle:

- **Detection & reporting** — the incident is recorded, whether detected by Compass monitoring or reported by the customer, and assigned a priority level (see Priority Levels) based on impact and urgency.
- **Classification & initial support** — the Support team conducts a preliminary assessment, categorizes the incident, provides initial support, and routes it to the appropriate team member.
- **Investigation & diagnosis** — available incident data is collected and analyzed to identify the appropriate response and actions.
- **Resolution & recovery** — once the issue is understood, a fix is identified and applied to return service to normal status.
- **Ticket closure** — the resolution is confirmed with the reporter; tickets close on customer confirmation.
- **Shared session collaboration** — where it helps, the Support team may request a screen-share to expedite diagnosis and resolution.

## Priority Levels

So that the Support team can understand the severity of the incident experienced, relevant information must be provided at the time the ticket is submitted via email or through the Support Portal. Tickets are assigned to be one of the following priority levels based on impact and urgency.

| PRIORITY LEVEL                                                                              | DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>URGENT</b><br>Service Outage<br><i>Services unavailable or Disaster Declaration made</i> | A major issue that inhibits a primary business function from operating as required. Requires rapid attention from the Cobalt Iron Support team. A “primary business function” means file and system restore and recovery functions and includes Compass and Vault service outages or all backups or restores failing.<br><br><b>Anticipated response time: 1 hour</b><br><b>Availability: 24x7x365</b> |
| <b>HIGH</b><br>Service Impacted<br><i>Regular impact on service</i>                         | An issue impacting the customer's business operations or that represents clear and present risk to business operations.<br><br><b>Anticipated response time: 2 business hours</b><br><b>Availability: Mon–Fri, 8 a.m.–5 p.m. CT, excluding U.S. holidays</b>                                                                                                                                           |
| <b>NORMAL</b><br>Service Impacted<br><i>Minor impact on service</i>                         | Incidents or errors that have minimal impact on the customer's business — for example, an issue causing a performance reduction or degradation of services.<br><br><b>Anticipated response time: 4 business hours</b><br><b>Availability: Mon–Fri, 8 a.m.–5 p.m. CT, excluding U.S. holidays</b>                                                                                                       |
| <b>LOW</b><br>Configuration Change or Service Question<br><i>Non-service impacting</i>      | Configuration changes and general service and how-to questions, including non-critical product improvements or desired modifications with no critical impact on the customer's business.<br><br><b>Anticipated response time: 8 business hours</b><br><b>Availability: Mon–Fri, 8 a.m.–5 p.m. CT, excluding U.S. holidays</b>                                                                          |

## Technical Support Goals

Our goal is to maintain availability of Accelerators to the highest levels possible. On an as-needed basis, we also aid in usage and error resolution for backup agents that customers manage in their environments. The table above identifies our internal goals, which are monitored and measured on a regular basis.

## Support Hours

Compass SaaS includes 24x7 support for any issue that results in a loss of data protection services (i.e., backup/restore) from a Vault. Cobalt Iron Support is also available 24x7 to assist in major business-impacting events such as a disaster declaration. For all non-critical topics, Cobalt Iron Support is available Monday through Friday, 8:00 a.m. to 5:00 p.m. Central Time (CT), excluding U.S. holidays.

| COVERAGE                                    | APPLIES TO                                                                                                                      |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <b>24x7 — Critical</b>                      | Loss of data protection services (backup/restore) from a Vault; major business-impacting events such as a disaster declaration. |
| <b>M–F, 8 a.m.–5 p.m. CT — Non-critical</b> | All other topics (excluding U.S. holidays).                                                                                     |

### Non-Critical Support Hours by Time Zone

The table below converts Cobalt Iron's standard non-critical support window (8:00 a.m. – 5:00 p.m. CT) into several global time zones to help international teams plan engagement.

| REGION / CITY                             | TIME ZONE      | SUPPORT WINDOW (LOCAL)        |
|-------------------------------------------|----------------|-------------------------------|
| <b>Central Time (Chicago / Dallas)</b>    | CT (UTC–6)     | 8:00 AM – 5:00 PM             |
| <b>GMT / UTC</b>                          | UTC±0          | 2:00 PM – 11:00 PM            |
| <b>London</b>                             | GMT (UTC±0)    | 2:00 PM – 11:00 PM            |
| <b>Central Europe (Frankfurt / Paris)</b> | CET (UTC+1)    | 3:00 PM – 12:00 AM (midnight) |
| <b>Mumbai</b>                             | IST (UTC+5:30) | 7:30 PM – 4:30 AM (next day)  |
| <b>Singapore</b>                          | SGT (UTC+8)    | 10:00 PM – 7:00 AM (next day) |
| <b>Sydney</b>                             | AEST (UTC+10)  | 12:00 AM – 9:00 AM (next day) |

*Conversions are based on U.S. Central Standard Time (CST, UTC–6) and the standard-time offset of each listed region. Daylight saving time in the U.S. or any listed region can shift the local equivalents by one hour during parts of the year. When precise timing matters, confirm against a current UTC clock.*

## Ad-Hoc & Special-Event Activities

*Please coordinate with us in advance.*

As an additional service, Cobalt Iron Support will facilitate, initiate, or participate in ad-hoc or special events to support customer requests. Examples include:

- Disaster Recovery (DR) testing
- Powering off a Vault or Accelerator
- Long-Term Retention (LTR) data migrations
- New Compass Accelerator deployment activities, such as cabling validation and storage encryption
- Network configuration changes to support additional redundancy or replication (changes that do not block existing data protection activities)
- Data center redundancy activities, such as power checks or network redundancy checks
- Other special or non-routine operations requiring Cobalt Iron involvement

This level of coordination improves Cobalt Iron's ability to contribute to these activities and to help ensure their success.

### Notice Requirements at a Glance

| REQUEST TYPE                                  | REQUIRED NOTICE                                                      | HOW TO REQUEST                    |
|-----------------------------------------------|----------------------------------------------------------------------|-----------------------------------|
| Special activity during normal support hours  | 3 business days                                                      | Open a Cobalt Iron support ticket |
| Special activity outside normal support hours | 2 weeks (14 calendar days)                                           | Open a Cobalt Iron support ticket |
| Any request falling on a U.S. holiday         | Additional justification required; may be rescheduled; SOW may apply | Open a Cobalt Iron support ticket |

### Scheduling Within Normal Support Hours

Whenever possible, schedule these activities during Cobalt Iron's normal support hours (M–F, 8 a.m.–5 p.m. CT). When scheduling, please provide at least 3 business days' notice so that all planning and preparation can be completed.

### Activities Outside Normal Support Hours

On occasion it will be necessary for activities to be performed outside Cobalt Iron support hours. For these requests, please provide at least 2 weeks' (14 calendar days') notice by opening a Cobalt Iron support ticket that explains what assistance is needed. All after-hours requests must be approved by Cobalt Iron to ensure resource availability.

### Readiness Confirmation

For any scheduled activity, Cobalt Iron requires confirmation no later than one business day prior to the scheduled activity that all customer-side resource allocation is complete and ready. This includes:

- Any support staff required are scheduled to arrive at the beginning of the change window.

- Any necessary hardware, cables, or other physical items have been identified and are ready and accessible on-site.

### Cobalt Iron Availability

Cobalt Iron provides a one-hour time allowance for the engagement of Product Support staff. If work cannot be started within the defined period, arrangements will be made to complete the requested work at the next available support window. If a one-hour window during which Cobalt Iron staff can begin work cannot be identified, work may be requested when needed and Cobalt Iron Product Support will respond to the request within 2 hours.

#### **A note on notice periods.**

Cobalt Iron understands that the requested notice may not always be possible. We are committed to supporting our customers, and requests received with less than the requested notice will be processed on a best-effort basis. Customers are encouraged to reach out as soon as possible — even when plans are still tentative — so we can work together to prepare.

#### **Please note:**

Avoid U.S. holidays whenever possible. If a request is for support during a U.S. holiday, you will be asked to provide additional justification and/or to schedule for another time. Depending on the nature of the request, a Statement of Work (SOW) may need to be in place before support can be provided. Additional charges may apply, depending on the nature, duration, and frequency of after-hours requests.

## Ticket Escalation Process

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You may request hierarchical escalation during the Cobalt Iron Support process when it appears that resolution of an incident will not occur in a timely or satisfactory manner. The Support ticketing system is the main point of communication; however, the escalation list below may be used when necessary.

| LEVEL   | CONTACT                             | REACH                                                                  |
|---------|-------------------------------------|------------------------------------------------------------------------|
| Level 1 | Support Center Specialists          | <a href="mailto:cisupport@cobaltiron.com">cisupport@cobaltiron.com</a> |
| Level 2 | Operations Manager                  | <a href="tel:(888)584-4766">(888) 584-4766</a>                         |
| Level 3 | Vice President, Customer Enablement | <a href="tel:(269)262-2121">(269) 262-2121</a>                         |
| Level 4 | Chief Financial Officer             | <a href="tel:(720)635-5276">(720) 635-5276</a>                         |

# Scope of Services & Responsibilities

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## Services In Scope

The services below are included in the standard Cobalt Iron Support agreement.

- a. Ticket support using Cobalt Iron's Zendesk system to open and manage all tickets.
- b. Providing guidance and consultation regarding Compass backup activities and reviewing customer documentation and providing feedback.
- c. Recommending strategies to achieve backup and recovery goals.
- d. Compass standard SLA delivery and achievement.
- e. Customer training in Compass software fundamentals.
- f. Informing customers of new Compass products and features.
- g. Providing guidance and consultation regarding agent installation and configuration for up to 5 servers per annum.
- h. Alerting the customer once a Compass Vault critical capacity threshold (90%) is exceeded.
- i. Conducting at least 3 Quarterly Business Reviews (QBRs) per 12-month period.
- j. Daily execution of the Compass Audit Framework for all Vaults and Conduits. Results made available to the customer via Compass Commander.
- k. Investigating and remediating Compass Audit Framework exceptions.
- l. Supporting Compass Vault and Conduit IP addressing and communications configurations for backup, restore, and Compass Analytics Engine connectivity.

## Services Out of Scope

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The services below are excluded from the standard Cobalt Iron Support agreement. Many of these are special event activities that can be arranged through the planned, scheduled process described under Ad-Hoc & Special-Event Activities and may require a Statement of Work (SOW).

- a. Data migration, data center moves, or infrastructure moves requested by the customer.
- b. Support for more than one Disaster Recovery or Penetration Test event per 12-month period.
- c. Custom reporting requirements that are not auto generated by Compass.
- d. Deletions and decommissioning of customer data stored on Compass.
- e. Compass Vault or Conduit installation and validation support outside of normal business hours.
- f. Relocating/retargeting Compass protection clients between Compass data protection instances or Compass Vaults.
- g. Relocating/migrating backup data from a customer backup environment to Compass Vaults.
- h. Compass Vault instance replication retargeting/reconfiguration.
- i. Data center facility projects requiring Cobalt Iron's participation in planning and execution assistance.
- j. Prolonged or enhanced support activities in response to a customer disaster declaration or cyber events.
- k. Ongoing assistance with common backup/restore Compass Agent usage, installation, and configuration.
- l. Customer-requested Compass Vault or Conduit changes, including adding storage, location changes, power outages, etc.

## Customer Responsibilities

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To ensure successful incident resolution, the customer assumes the responsibilities below when engaging with Cobalt Iron Support.

- a. Setting backup and retention policies and operating the Compass software, including determining who accesses Compass software.
- b. Determining, managing, and providing sufficient available capacity levels of data using Compass software and components.
- c. Notification of Disaster Recovery testing events with more than 30 days' notice.
- d. Development of and possessing data restoration skills and procedures according to their needs, including those required for disaster and/or cyber recovery events.
- e. Attending QBRs.
- f. Familiarity with the location and contents of agent error logs.
- g. Performing initial triage of backup failures — including detection, error log analysis, and investigating error messages — before raising a ticket with Cobalt Iron Support.
- h. When opening a ticket, providing details of the problem experienced, describing the troubleshooting steps performed, and supplying information on any error messages observed, along with information and logs requested by Cobalt Iron Support, in a timely manner.
- i. For Accelerator (Vault) decommissions, providing four weeks' advance notice for planning purposes, with a minimum of two weeks to perform decommission activities. The Accelerator Analytics Engine Connection (AEC) must remain operable until decommission activities are complete and the hardware is returned to the customer for their use.