

FortiCare Helper Extension

About FortiCare Helper Extension

FortiCare Helper is browser extension developed by Fortinet API team (emea_api@fortinet.com).

It has two main uses:

1. Sales personnel can easily escalate tickets that need better handling.
2. TAC personnel can easily prepare all the formalities for sending ticket to FollowTheSun (FTS).

This document and all relevant files can be downloaded from <https://forticarehelper.fortinet-emea.com/>.

Changelog

Date	Document version	Extension version	Comment
8 April 2021	1	1.2	Initial version
21 April 2021	2	1.3	Changes in URLs and about role being mandatory
11 May 2021	3	1.11	Multi-region escalation, default CC, internal SE forticare

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Installing FortiCare Helper Extension

Currently the extension is supported by following browsers (version in brackets shows the last browser version that was tested):

- Firefox (87)
- Chrome (89)
- Safari (14)
- Edge (89)

Installing in Firefox

1. Open following URL to get signed extension file:
https://forticarehelper.fortinet-emea.com/forticare_helper_extension.xpi
2. Prompt will appear to confirm adding the extension. Click on “Add” button.
3. Extension icon  will appear in Firefox extensions tray (right from address bar).

Installing in Chrome

1. Open following URL to access Chrome Web Store:
<https://chrome.google.com/webstore/detail/forticare-helper-extension/lcgiahkbqgladbcchloglbijddkclff/>
2. Click on *Add to Chrome* button and then confirm with *Add extension*.

If you cannot see the extension icon  in Chrome extensions tray (right from address bar):

3. Click on  to manage extensions
4. Add the extension by clicking on “pin” icon  FortiCare Helper Extension 

Installing in Safari

Safari extensions should be installed via AppStore which we don't want to do yet. For testing purposes following procedure can be used – this has however a strong disadvantage that step 3 must be repeated when Safari restarts.

1. Open Safari and Preferences from menu.
2. Switch to “Advance” tab and enable “Show Develop menu in menu bar” at the bottom.
3. In “Develop” menu enable “Allow Unsigned Extensions”.
4. Download zip file from:
https://forticarehelper.fortinet-emea.com/forticare_helper_extension_mac.zip
5. Move “FortiCare Helper Extension.app” from archive to your Applications folder.
6. Start “FortiCare Helper Extension” from Applications folder and then close it.
7. In Safari “Preferences” navigate to “Extensions” tab and enable this extension.
8. Extension icon  will appear in Safari extensions tray (left from address bar).

If you restart Safari, you need to repeat step 3.

Installing in Edge

1. Open following URL to access Chrome Web Store (sic!):
<https://chrome.google.com/webstore/detail/forticare-helper-extension/lcgiahkbqgladbcchloglbjddkclff/>
2. If you did not allow it before, on the top of the page you will see blue banner with button “Allow extensions from other stores”. Click it and confirm by clicking on “Allow” in the confirmation dialog that appears.
3. Click on “Add to Chrome” (sic!) button and then confirm with “Add extension”.
4. Extension icon  will appear in Edge extensions tray (right from address bar).

Installing in Brave

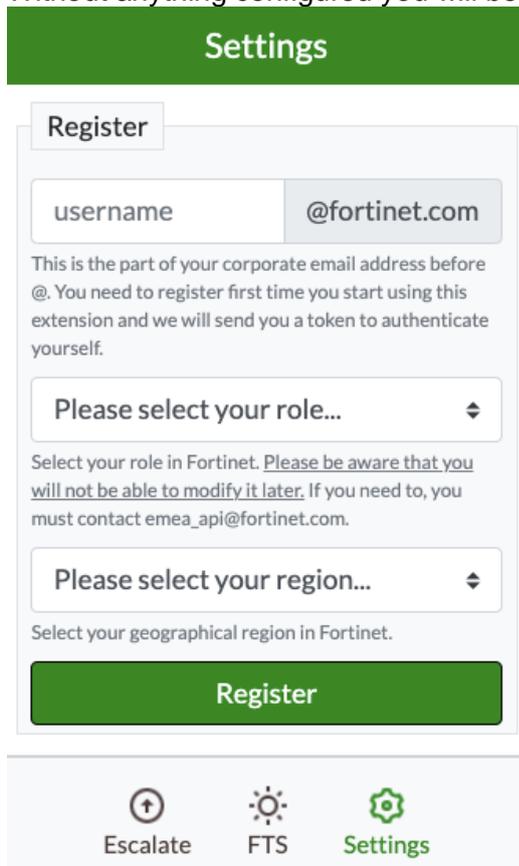
Follow the same instructions as for Chrome.

Registering to FortiCare Helper Extension

Once the extension is installed, every user must register. This is to verify that the user is valid Fortinet employee (by having access to email in fortinet.com domain). Without registration (or access to that email) the extension will not work.

If you lose your token, you can register again, but only once per 24 hours.

1. Click on the FortiCare Helper Extension icon in your browser: 
2. Without anything configured you will be presented with the *Settings* tab:



The screenshot shows the 'Settings' tab of the FortiCare Helper Extension. It features a 'Register' button at the top left. Below it is a form with a 'username' input field and a dropdown menu for '@fortinet.com'. A text block explains that the username is the part of the corporate email address before the '@' and that registration is required for token generation. Below the form are two dropdown menus: 'Please select your role...' and 'Please select your region...'. A large green 'Register' button is at the bottom of the form. At the very bottom of the page, there are three navigation icons: 'Escalate' (upward arrow), 'FTS' (sun), and 'Settings' (gear), with 'Settings' being the active tab.

3. First you need to fill your username. That is the LDAP user part of your corporate email address before “@”.
4. Then select your role in company. Based on your selection you will have access either to “Escalate” (role “Sales”) or “FTS” (role “Support”) tab. **Be aware that your role becomes unmodifiable and you must contact EMEA API Team if you want to change it later.**
5. Select your region. Currently this is used for Sales role to escalate ticket into the correct region, but it is mandatory also for Support role.
6. Then click on *Register* button.
7. In few seconds you will receive email like this:

Hello oholecek,

Someone, probably you, requested the token for Fortinet FortiCare Helper.

This is your token, please fill it on the extension option page.

0b2ee366d67d9ecd2b117a4cbede6d2784cf0262

If you didn't request it, please contact API team on emea_api@fortinet.com.

8. Copy the token string from email and paste it to *Authentication token* input on the same tab and click on *Save* button:

Settings

Select your role in Fortinet. Please be aware that you will not be able to modify it later. If you need to, you must contact emea_api@fortinet.com.

EMEA

Select your geographical region in Fortinet.

Register

Authentication token

0b2ee366d67d9ecd2b117a4cbede

You should have received this token to your corporate email address after you registered to this extension. If you lost your token, you can register again to receive it, but only once in 24 hours.

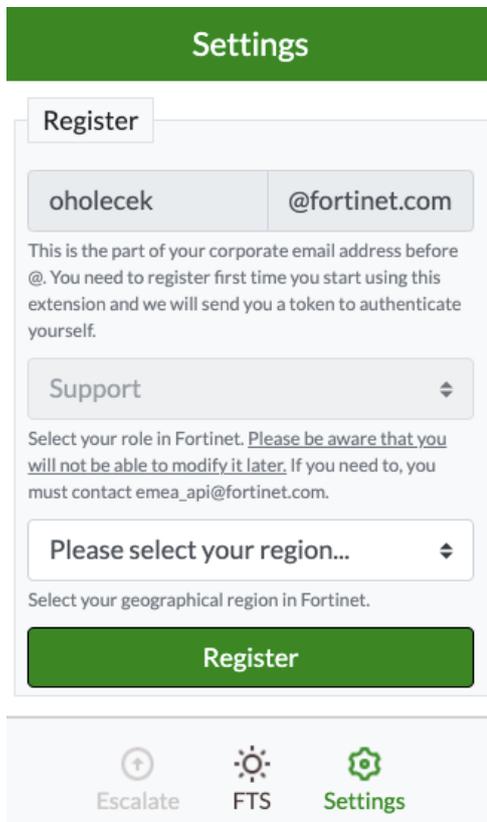
Save

 Escalate  FTS  **Settings**

Now you can Escalate ticket or start the Follow the Sun (FTS) procedure, depending on the configured role.

Upgrading from version before region selector

Region selection was introduced in version 1.11. If your extension upgraded from version before this one, you will not be able to use it until you select correct region - every time you click on extension icon, you will be presented with Settings tab like this:



Settings

Register

oholecek @fortinet.com

This is the part of your corporate email address before @. You need to register first time you start using this extension and we will send you a token to authenticate yourself.

Support

Select your role in Fortinet. Please be aware that you will not be able to modify it later. If you need to, you must contact emea_api@fortinet.com.

Please select your region...

Select your geographical region in Fortinet.

Register

Escalate FTS **Settings**

In that case, just select the right region and click on *Register* button. It will only save the region and **will not** trigger registration process again.

Escalate feature

Ticket escalation is used by sales personnel to notify the TAC management that the ticket is not handled correctly, or it needs special attention for whatever reason.

How to escalate ticket

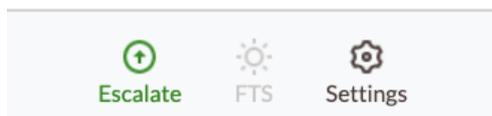
1. From the extension popup window click on *Escalate* tab. If you have selected your role as *Sales Engineer*, the right tab will appear automatically when you click on extension's icon:

Ticket escalation

This is to request ticket escalation.

Enter the ticket number and you will be redirected to FortiCare ticket where the escalation form will appear.

After you fill it, correctly-formatted email will be sent to all managers.



2. Enter the ticket number you want to escalate. If you are already on the FortiCare ticket page, the right number will be pre-filled for you.
3. Click the button *Start escalation process* and the ticket will be automatically opened (if it is not open yet).
4. Special *Ticket escalation* dialog will appear:

Ticket escalation

Escalation region:

Out of hours escalation

EMEA

Escalation should be done in your region. In the matter of most urgency, you can enable the checkbox above to escalate to different region.

Additional emails to notify:

user1@fortinet.com user2@fortinet.com

You can only include emails on fortinet.com domain. You will receive the email automatically even without specifying it here.

Reason for escalation:

I want to escalate this case because...

Please insert precise reason why you want to escalate this case - the more information the better.

Send escalation

Cancel

5. By default, the case will be escalated to responsible managers in your own region. If your escalation is super-urgent and cannot wait for business hours in your region, you can select *Out of hours escalation* checkbox and manually select another region. This feature shouldn't be used on regular basis.
6. You and the responsible managers will automatically receive the copy of escalation email. You can also add more people send it to, but all emails must be in @fortinet.com domain.
7. Fill the *Reason for escalation* field and provide with as much information as possible. Be aware that a sole phrase like "please escalate 123456" is never enough.
8. When finished push the *Send escalation* button.
9. In few seconds, the right-formatted email will be sent to all relevant people. You will see a notification in the top part of this dialog, and it will close.

Follow the Sun feature

Support engineer can (after agreement from direct manager) transfer the ticket to *FollowTheSun* (FTS) queue.

This is done when the shift of current engineer is over, but the ticket needs to be actively worked on in another TAC.

How to send ticket to FollowTheSun queue

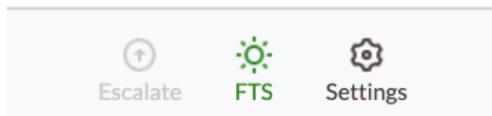
1. From the extension popup window click on *FTS* tab. If you have selected your role as “*Support*”, the right tab will appear automatically when you click on extension’s icon:

Follow The Sun

This is to prepare formalities before sending ticket to FollowTheSun queue.

Enter the ticket number and you will be redirected to FortiCare ticket where the FTS form will appear.

After you fill it, correctly-formatted email will be sent to FTS managers.



2. Enter the ticket number you want to escalate. If you are already on the FortiCare ticket page, the right number will be pre-filled for you.
3. Click the button *Start FTS process* and the ticket will be automatically opened (if it is not open yet).
4. Special *Follow The Sun* dialog will appear:

Follow The Sun

Case number

3885030

Customer priority

C3

Case priority

P2

Support contract

24x7

Transfer to

Canada (event local time: Wednesday, 21 April 2021, 07:00)

Next interaction with customer

Exact date and time

21/04/2021



16:00



Europe/Prague

Specify the date and time in customer's timezone and also specify what timezone it is (please use the closest city). When this form is submitted, it will be automatically calculated for the timezone in target TAC.

Additional emails to notify

user1@fortinet.com user2@fortinet.com

You can only include emails on fortinet.com domain. You will receive the email automatically even without specifying it here.

Handover

Next action:

Monitor

Summarize the action expected from the next engineer. In one or two words if possible. Commonly used actions are "monitor", "call customer", "expect call", etc.

Summary:

This case must be followed because...

Name and phone number (including country code) of engineer on customer's side...

From the next TAC it is expected that...

Please insert precise description of what you expect to happen with the ticket in the target TAC. Also input information about the customer, name and phone number of engineer handling the case on customer's side, and any other information that can be useful.

Follow The Sun

Cancel

5. Fill all the fields as following:

- Transfer to* is the name of the TAC you need to handle this case. In brackets you can see the *Next interaction with customer* time in the time zone of target TAC.
- Next interaction with customer* can be either *When customer calls in* or *on specific date & time*, in which case you need to specify that time. You need to fill the time in customer's time zone and select what their time zone is. The extension will automatically recalculate this time for the time zone used in target TAC.
- You will receive a copy of the FTS email automatically, but if you want to include somebody else from Fortinet, you can add their @fortinet.com emails to *Additional emails to notify* section. Non-Fortinet emails are not allowed.

- d. *Next action* should be a very short comment, a few words would be enough.
 - e. *Summary* field expects you to fully describe why the ticket is being escalated, what is expected from the target TAC and it should also contain the phone number of the engineer handling this case on customer's side.
6. When finished push the *Follow The Sun* button.
 7. In few seconds, the right-formatted FTS email will be sent to you and all relevant people. You will see a notification in the top part of this dialog, and it will be closed.
 8. The FortiCare ticket will be modified with *Escalate* action, the right queue & TAC will be set, and the internal summary like the FTS email will be prepared as an internal comment:

Add Comment To Description Internal Only External NotePad

Text Mode HTML Mode Note: The maximum characters system allow to be entered here is 8000.

```
Case Number #4749133 : Intermittent huge latency with SSLVPN
- Priority: P3
- Support: 24x7
- Handover Summary in ticket: yes
- Expected date and time of interaction with client:
06 April 2021 14:00:00 UTC-0400 (Canada TZ "Canada/Eastern")
06 April 2021 20:00:00 UTC+0200 (Customer TZ "Europe/Paris")
- Next Action: Monitor
- Handover summary: test
```

Warning: These FortiCare changes (internal note and new queue) are not submitted automatically – you must review them and submit the FortiCare ticket manually!

Additional functions: Default CC

Since version 1.11 there is section called *Default CC* on Settings tab. You can enter emails (separated by space) with @fortinet.com domain, that will be automatically prefilled in FTS and Escalate forms.

Settings

Authentication token

0b2ee366d67d9ecd2b117a4cbede

You should have received this token to your corporate email address after you registered to this extension. If you lost your token, you can register again to receive it, but only once in 24 hours.

Save

Default CC

test@fortinet.com manager@fortin

List of emails (separated by space) that will be automatically prefilled in CC fields.

Save CCs

Escalate FTS **Settings**

Emails from *Default CC* section will only be used as default values, and you will be able to delete, update or add more emails, later when the right dialog is triggered.

Ticket escalation

Escalation region:

Out of hours escalation

EMEA

Escalation should be done in your region. In the matter of most urgency, you can enable the checkbox above to escalate to different region.

Additional emails to notify:

test@fortinet.com manager@fortinet.com

You can only include emails on fortinet.com domain. You will receive the email automatically even without specifying it here.

Reason for escalation:

I want to escalate this case because...

Please insert precise reason why you want to escalate this case - the more information the better.

Send escalation Cancel

Follow The Sun

Case number
3885030

Customer priority
C3

Case priority
P2

Support contract
24x7

Transfer to

Canada (event local time: Tuesday, 11 May 2021, 05:00) ▼

Next interaction with customer

Exact date and time ▼

11 / 05 / 2021



14 : 00



Europe/Prague ▼

Specify the date and time in customer's timezone and also specify what timezone it is (please use the closest city). When this form is submitted, it will be automatically calculated for the timezone in target TAC.

Additional emails to notify

test@fortinet.com manager@fortinet.com

You can only include emails on fortinet.com domain. You will receive the email automatically even without specifying it here.

Handover

Next action:

Monitor

Summarize the action expected from the next engineer. In one or two words if possible. Commonly used actions are "monitor", "call customer", "expect call", etc.

Summary:

This case must be followed because...

Name and phone number (including country code) of engineer on customer's side...

From the next TAC it is expected that...

Please insert precise description of what you expect to happen with the ticket in the target TAC. Also input information about the customer, name and phone number of engineer handling the case on customer's side, and any other information that can be useful.

Follow The Sun

Cancel