



# **Customer Support Portal**

## Customer User Guide



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## Introduction

**EDB's Customer Support Portal** is where our **shared experience** takes place. It is where you meet our Support Services team, create and manage your support tickets, manage your team's access to the Portal, and help shape how Postgres can help you implement change and innovation in your company.

Features and Goals:

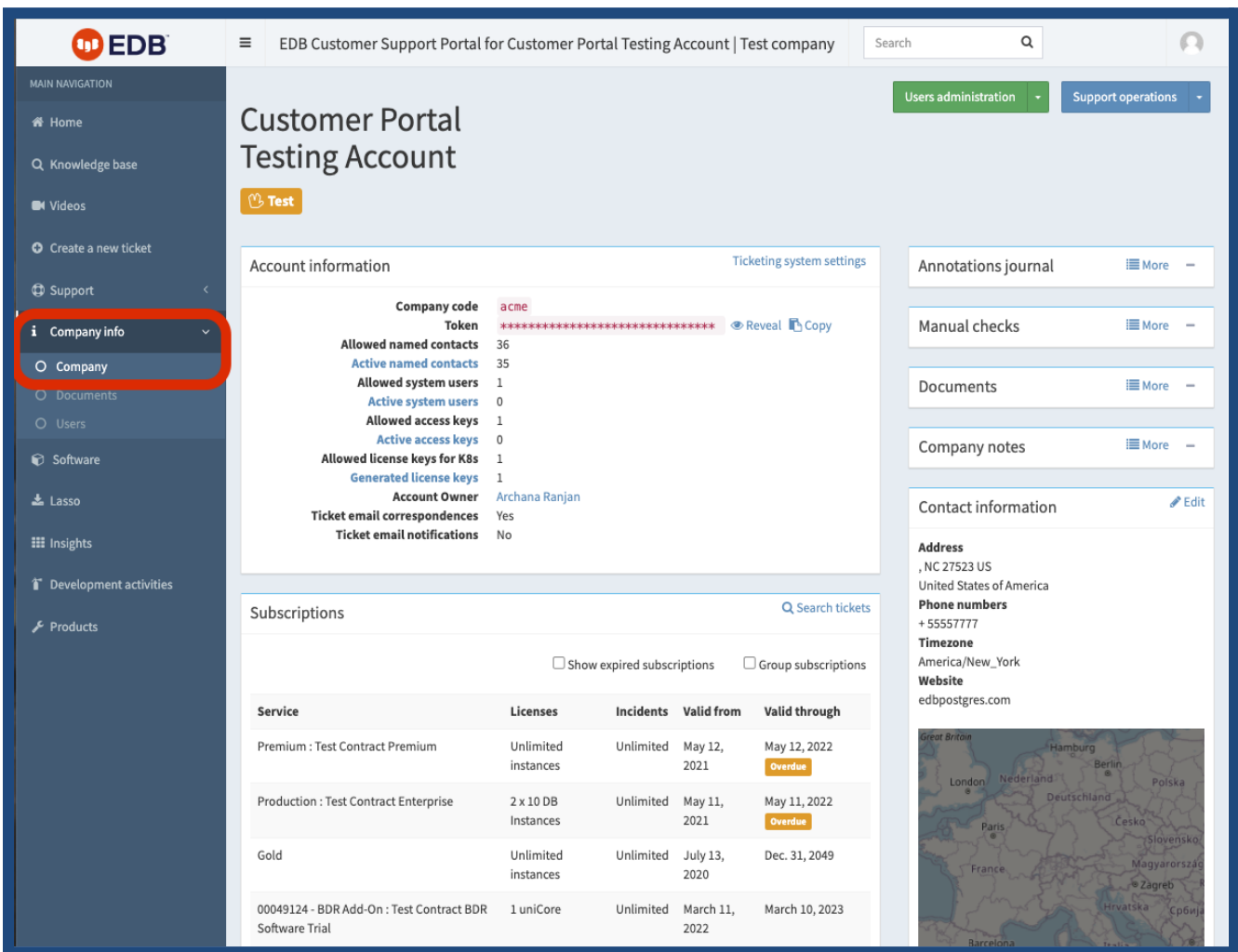
- access to your purchased support service and subscriptions via a Single Sign-On system
- access to technical content written by some of the best experts in the world for Postgres via our Knowledge Base
- transparently share information, such as technical documents, to facilitate our incident response process during support operations
- empower company administrators to independently and autonomously manage users and their access to the Customer Support Portal
- grant full control of personal data to each user while ensuring its safety using mechanisms which support compliance such as

The screenshot displays the EDB Customer Support Portal interface for a user named 'Your Name' (Customer Portal Testing Account). The page features a main navigation sidebar on the left with options like Home, Knowledge base, Videos, Create a new ticket, Support, Company info, Software, Lasso, Insights, Development activities, and Products. The main content area is divided into several sections:

- Welcome to EDB:** A central section with a user profile icon, name, and account type. It also shows the last login on SSO (34 minutes ago), newsletter subscriptions, and service subscriptions (Premium, Production, Gold, BDR Add-On, ACI).
- Technical alerts:** A section titled 'Technical alerts' with a sub-header 'EDB periodically issues technical alerts and updates. As an authorized user of the EDB support portal you will automatically receive these in your inbox. If you miss an alert, you can find the full listing of alerts here: support.enterisedb.com.'
- Latest knowledge base docs:** A section titled 'Latest knowledge base docs' with a list of recent documents: 'Subtransactions Release Rollback Savepoint' (Feb 06, 2023), 'Subtransactions Introduction' (Feb 06, 2023), 'Major Postgres upgrade using native logical replication and handling tables WITH OIDS' (Feb 03, 2023), 'Keep your libraries updated' (Jan 19, 2023), and 'Configuring BDR or pglogical for SSL / TLS' (Jan 19, 2023).
- Latest software releases:** A section titled 'Latest software releases' with a list of recent releases: 'TPA 23.11' (Jan. 31, 2023), 'Barman 3.4.0' (Jan. 26, 2023), 'TPA 23.10' (Jan. 4, 2023), 'pglogical 3.7.19' (Dec. 14, 2022), and 'BDR 4.2.2' (Dec. 14, 2022).
- Latest PostgreSQL releases:** A section titled 'Latest PostgreSQL releases' with a list of recent releases: '15.1' (Nov. 10, 2022), '14.6' (Nov. 10, 2022), '13.9' (Nov. 10, 2022), '12.13' (Nov. 10, 2022), and '11.18' (Nov. 10, 2022).
- Tickets:** A section titled 'Tickets' with two cards: '49 Active tickets' and '84 Tickets in the last 6 months'. Below these cards is a 'Create a new ticket' button.

## Company and User Management

- Access to the Customer Support Portal (the Portal) is limited to those companies that have a valid subscription or service contract with EDB.
- All resources in the Portal are controlled or accessible at the company level, including users, support incidents, subscriptions, documents, notes, and servers' metadata.
- Customers will find a unique token used by their company to identify itself when subscribing to specific repositories or download Lasso.



The screenshot displays the EDB Customer Support Portal for a testing account. The main navigation sidebar on the left includes options like Home, Knowledge base, Videos, Create a new ticket, Support, Company info (highlighted with a red box), Company, Documents, Users, Software, Lasso, Insights, Development activities, and Products. The main content area is titled "Customer Portal Testing Account" and features a "Test" button. Below this, there are sections for "Account information" and "Subscriptions".

**Account information**

Company code	acme
Token	***** Reveal Copy
Allowed named contacts	36
Active named contacts	35
Allowed system users	1
Active system users	0
Allowed access keys	1
Active access keys	0
Allowed license keys for K8s	1
Generated license keys	1
Account Owner	Archana Ranjan
Ticket email correspondences	Yes
Ticket email notifications	No

**Subscriptions**

Service	Licenses	Incidents	Valid from	Valid through
Premium : Test Contract Premium	Unlimited instances	Unlimited	May 12, 2021	May 12, 2022 <b>Overdue</b>
Production : Test Contract Enterprise	2 x 10 DB Instances	Unlimited	May 11, 2021	May 11, 2022 <b>Overdue</b>
Gold	Unlimited instances	Unlimited	July 13, 2020	Dec. 31, 2049
00049124 - BDR Add-On : Test Contract BDR Software Trial	1 uniCore	Unlimited	March 11, 2022	March 10, 2023

The right sidebar contains various management tools: Users administration, Support operations, Annotations journal, Manual checks, Documents, Company notes, and Contact information (with an Edit link). The contact information includes address, phone numbers, timezone, and website. A map of Europe is visible at the bottom right.

## User Management

Your authorized **Users (named contacts)** can be found by going to **Company Info > Users** found on the blue navigational column located on the left side of the screen.

Following the principles of General Data Protection Regulation (GDPR), EDB's Customer Support Portal allows every user to **autonomously and independently manage** their own information, such as:

- primary email address
- additional email addresses (aliases)
- mobile and office phone numbers
- work location

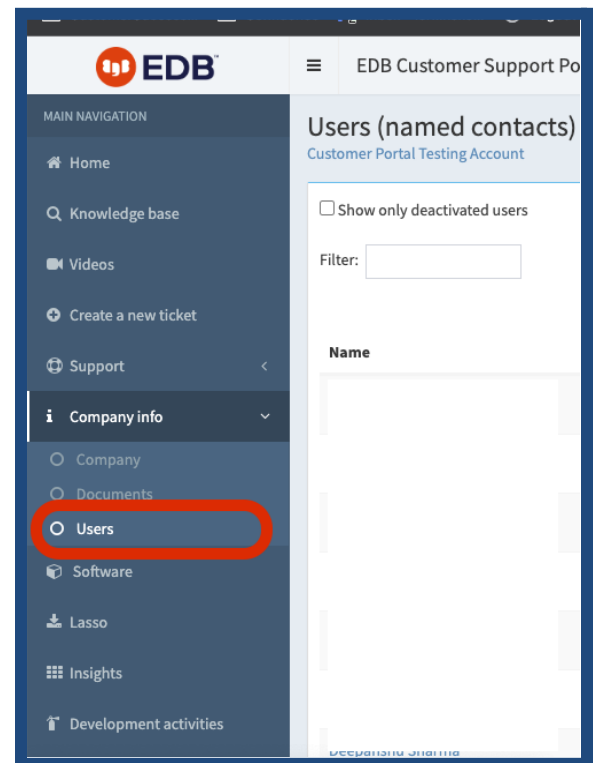
While providing this information is not mandatory, we advise customers to complete it. Having reliable and updated contact information in the Portal facilitates proper communication and coordination activities during an emergency. Moreover, providing details on your work location allows the Portal to detect your time zone so that our engineers know when to expect your interactions with us.

Your username and password are safely stored in our **single sign-on system**, which grants you access to all our multiple independent systems.

1. Please regularly check that the list of users (named contacts) allowed access to the Portal within your company is up-to-date and correct.
2. Also, please make sure email delivery is correctly working for all your named contacts, by checking the "Last mail delivery status" field in the list of users for your company.

## Authorized Users

- By default, every company has a maximum of 5 named accounts. This allotment of users can be expanded in alignment with the Terms & Conditions of your active contract(s). Please contact EDB if you need assistance with your allotted user count.
- Each company is expected to manage its own named contact list (**Authorized Users**). The Portal requires at least one named contact to be identified to have administrative privileges (subscription administrator).
- The EDB Support Portal offers two roles to authorized users.
  - o Subscription Admin – indicated with an "A" in the user listing.
  - o Subscription User – indicated with a "U" in the user listing.





The Subscription Administrator is responsible for adding and removing users.

P = Pending portal log in  
A = Administrator  
U = User

\*Users who have not previously registered their email will receive an activation link. They must click the link and set their password to complete the registration process.

Users (named contacts)  
Customer Portal Testing Account

Show deactivated users Show more [+ Add a new user](#)

Filter:

Name	Email	Last access time	Info	Last mail delivery status	Actions
User A	usera@company.com	2022-10-10 19:04 UTC	U	👍	🔒 👤
User B	userb@company.com	10/9	U P	👍	🔒 👤
User C	userc@company.com	2022-10-11 11:43 UTC	A	👍	🔒 👤
User D	userd@company.com	2022-10-19 06:48 UTC	U	👍	🔒 👤

Info	Last mail delivery status	Disable and Role change icons
U P	👍	🔒 👤
U	👍	🔒 👤
A P	👍	🔒 👤
U P	👎	🔒 👤



### Subscription Admin Role:

The Portal requires at least one named contact to be identified as the Subscription Admin (A). However, each company can add additional admins if they wish. Admins can...

- Add new users to their organization's authorized user list
  - Click the "+ Add a new user" button to begin the process of adding your team member to the authorized user list. You will be asked to fill out a short form which will begin the registration process for that user. The user will receive a message with the next steps.
  - If you receive an error message, EDB will be alerted and an investigation of the issue will be triggered. The issue should be resolved within 24 hours or less.
- Disable or lock user access – using the "padlock" icon. These users can be 'unlocked or re-enabled' at any point if the admin determines this is needed.
- Assign or remove administrative privileges to other users (i.e., promote them from a "User" to an "Admin" or the reverse) – using the "person icon".
- Manage users that need to be automatically added to support cases. (See details on case management.)

### User Role:

Any named contact that is not an admin will be considered a **User (U)**. Users can navigate the portal, open cases and see all cases. The only difference in this role is that they are not able to manage the user list. Otherwise, their privileges in the portal are the same as an admin.

## Knowledge Base

Our subscribing customers have exclusive access to our customer-only **Knowledge Base**, a searchable collection of articles, solutions, and useful documentation about PostgreSQL and related products developed and supported by EDB.



You can search our knowledge base using the “Knowledge base” link from the left menu; given a search term, the system will find the relevant articles and solutions, which can be filtered by product later. The same operation can be done via the global search bar that you can find at the top of the page.

Our knowledge base is made up of two kinds of documents: articles and solutions:

- Articles are free-form documents covering a certain topic or technology solutions that have an incident-oriented approach: identifying the problem, outlining the steps required to resolve it, and the root cause.

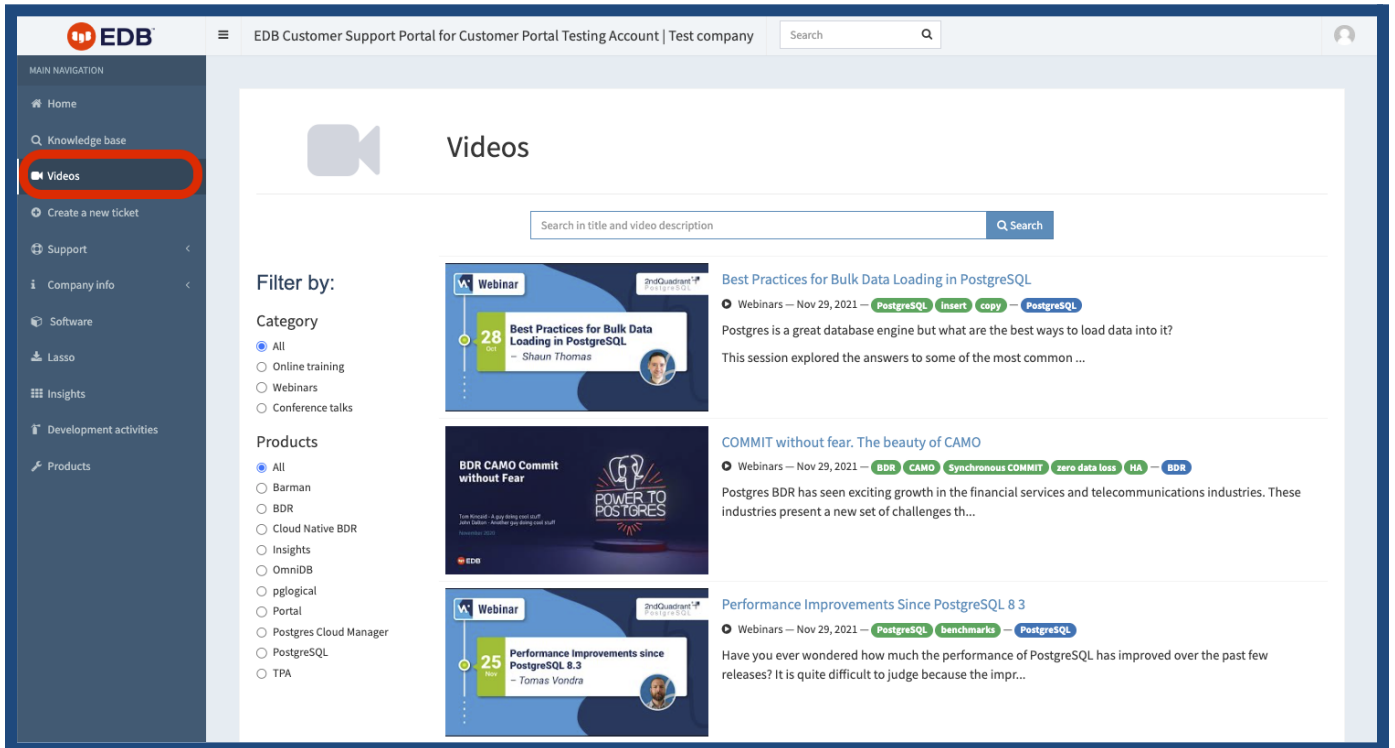
Support engineers will occasionally link a knowledge base entry to a support ticket, providing a well-known and verified reference to the issue you faced.

## Videos

EDB is the largest single collective organization of PostgreSQL experts of any company globally. Our experts deliver some of the most popular conference talks, webinars, and training sessions about PostgreSQL.

- You can now browse our catalog of videos directly in the Portal.
- The global search feature is able to return those video entries that contain your keywords in their metadata.
- Similar to the knowledge base, support engineers will occasionally link a video to a support ticket, providing a well-known and verified reference to the issue you faced.





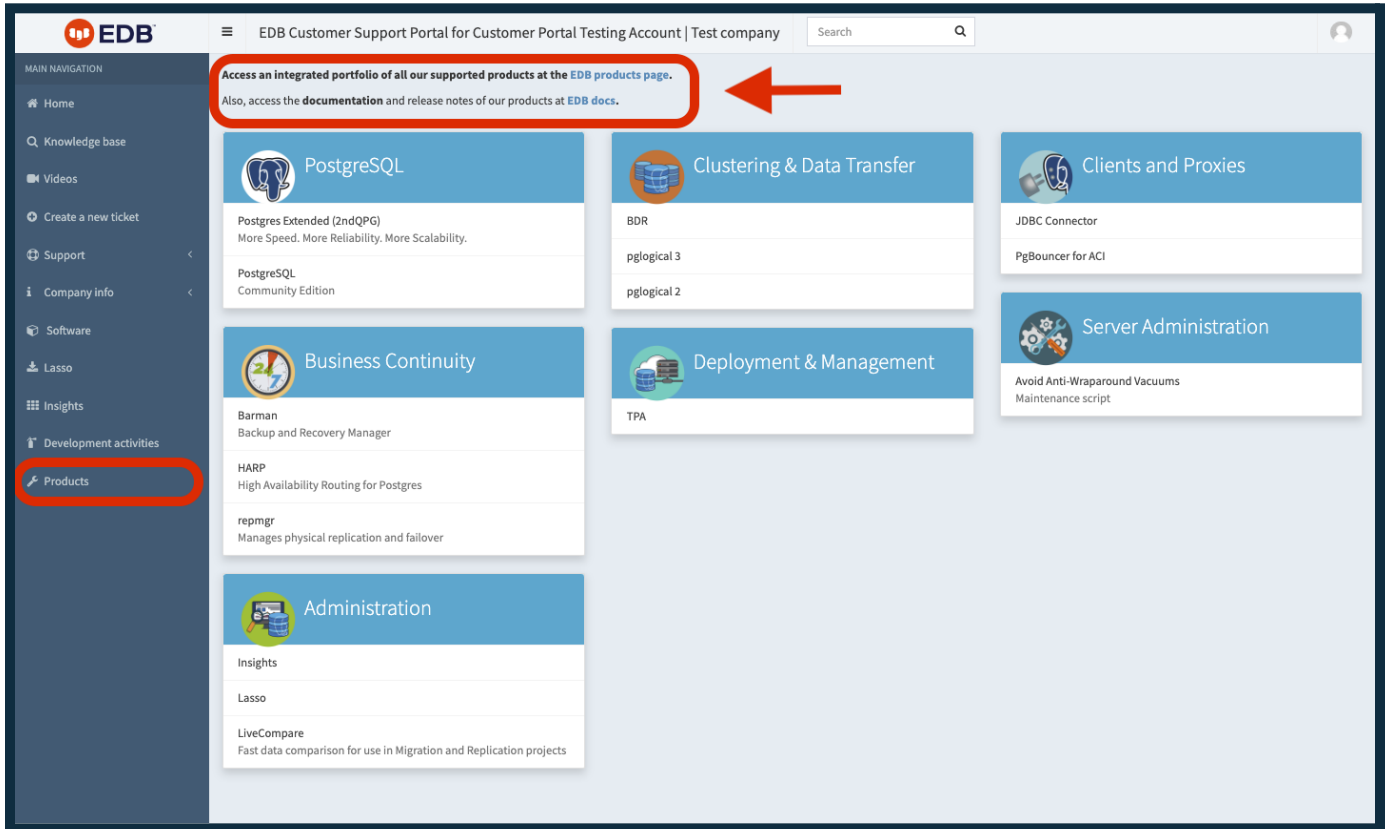
## Product Docs & Release Notes

The Customer Support Portal hosts access to an inventory of **products that are part of the PostgreSQL ecosystem**, some of which are **directly developed by EDB**.

Every product has a page with a description and, most importantly, a link to the documentation, the source code, related knowledge base resources, and the package repository (where applicable).

We also have a detailed section dedicated to PostgreSQL, providing all release notes, release dates, and support levels.

Please note the top of the product page provides a link to **EDB Docs** page featuring documentation on our solutions. These links will take you to the EDB website where downloads are possible.



The screenshot shows the EDB Customer Support Portal interface. The top navigation bar includes the EDB logo, a hamburger menu, the text "EDB Customer Support Portal for Customer Portal Testing Account | Test company", and a search box. A red box highlights a message in the top right: "Access an integrated portfolio of all our supported products at the EDB products page. Also, access the documentation and release notes of our products at EDB docs." A red arrow points from this message to the "Products" link in the left sidebar. The sidebar, under "MAIN NAVIGATION", lists: Home, Knowledge base, Videos, Create a new ticket, Support, Company info, Software, Lasso, Insights, Development activities, and Products (highlighted with a red box). The main content area features several product category cards: PostgreSQL (listing Postgres Extended (2ndQPG) and PostgreSQL Community Edition), Clustering & Data Transfer (listing BDR, pglogical 3, and pglogical 2), Clients and Proxies (listing JDBC Connector and PgBouncer for ACI), Business Continuity (listing Barman, HARP, and repmgr), Deployment & Management (listing TPA), and Administration (listing Insights, Lasso, and LiveCompare).

## 24/7 Support Ticketing System

The Portal includes a custom **Ticketing System**, which is the main communication bridge between you and the Support team at EDB, 24 hours a day, 7 days a week.

The system has been designed to **improve customers' experience** with our world class support service, by facilitating information sharing and speeding up the incident resolution process.

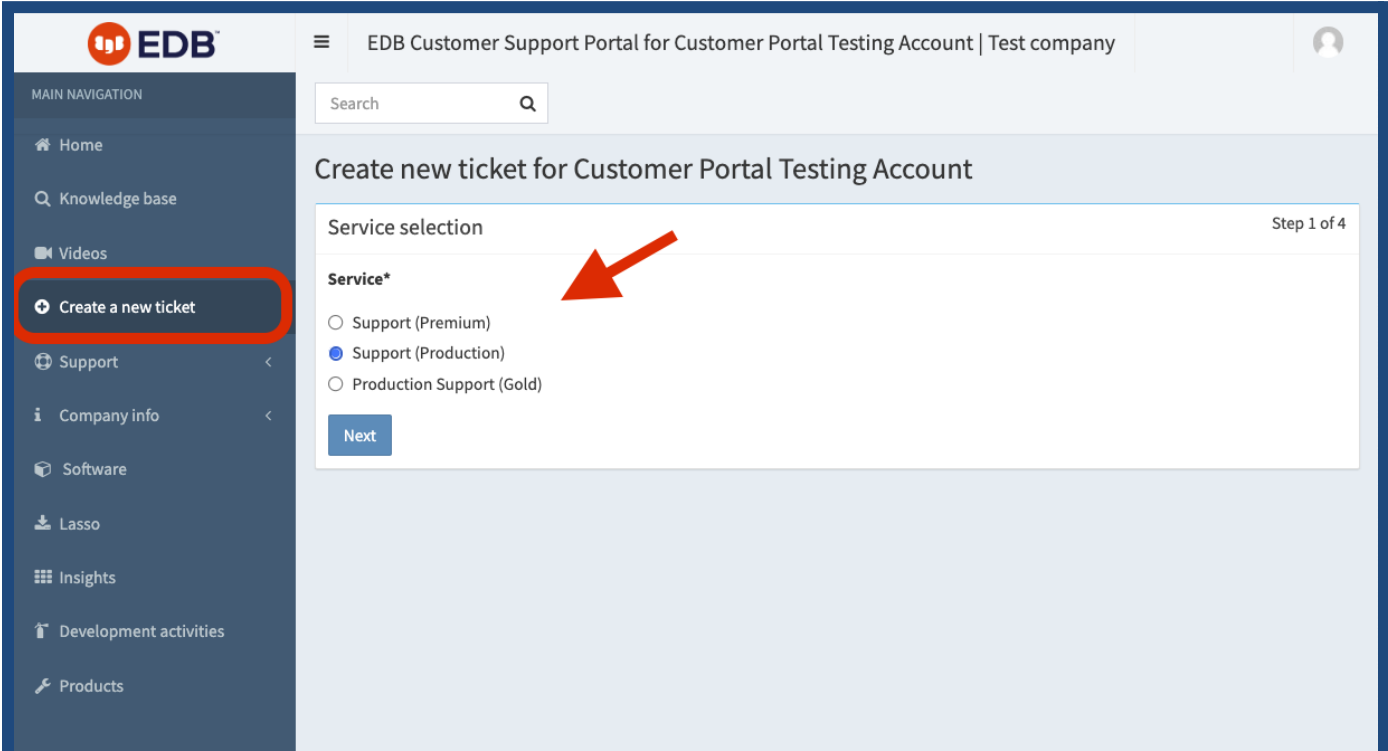
If you have purchased a support service you are granted access to the Support service area in the Portal, accessible from the left panel of the interface.

### Creation of a new support ticket

You can create a new support ticket through the **Create a new ticket** link from the left panel menu.

#### Step 1: Selecting the service

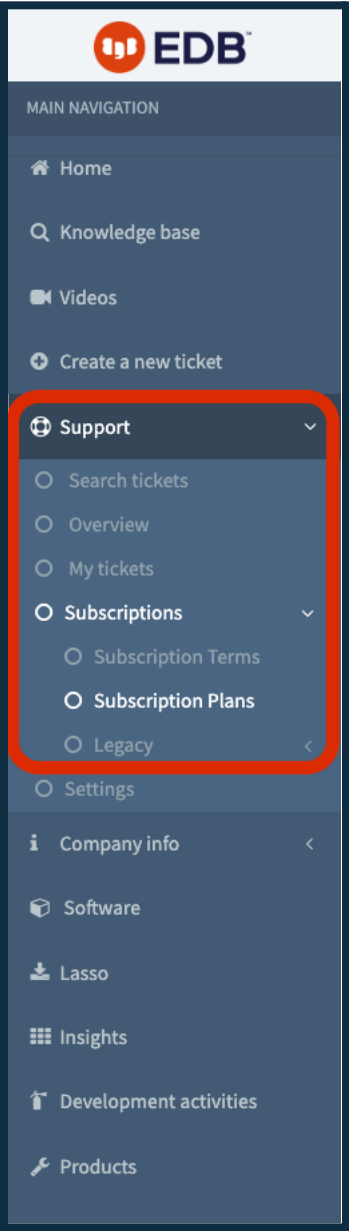
If your company has subscribed to more than one service, you need to select the appropriate support service from the selection menu for your incident.



The screenshot displays the EDB Customer Support Portal interface. On the left, a dark blue navigation menu lists various options, with 'Create a new ticket' highlighted by a red circle. The main content area shows the 'Create new ticket for Customer Portal Testing Account' page, which is 'Step 1 of 4'. A red arrow points to the 'Service\*' selection form, which includes three radio button options: 'Support (Premium)', 'Support (Production)' (which is selected), and 'Production Support (Gold)'. A 'Next' button is located below the selection options.



**NOTE:** You can read the description of the services we offer under the “Support” menu in the “Subscriptions > Subscription Plans” item. From there, you can also find the list of software that we support.





## Step 2: Selecting the severity level

When opening a new support ticket, you need to pick the most suitable severity level for your incident. There are four severity levels defined as part of our Subscription, Support, and Services Agreement:

- "Severity 1 Error" means a catastrophic production Error in the subscribed software which severely impacts Your production systems, or in which the subscribed software in Your production systems is down or not functioning, or an Error in the subscribed software which is causing a loss of production data and no procedural workaround exists. Severity 1 Errors also include security breaches originating within the code of the subscribed software which rate as a CVSS Score of 9 or higher.
- "Severity 2 Error" means the subscribed software, which is in production, is operational but certain major functions are not performing in all material respects in accordance with its documentation and no workaround is available.
- "Severity 3 Error" means (a) minor functions of the subscribed software, which is in production, are not performing in accordance with its documentation or (b) the subscribed software, which is in development or a test environment, is not performing in accordance with its documentation.
- "Severity 4 Error" means a general usage question or recommendation for a future product enhancement or modification. There is no impact on the quality, performance, or functionality of the subscribed software. This Severity Level covers non-urgent problems including cosmetic issues, feature requests, or information requests.

The first two severity levels are handled as **priority incidents** by EDB Support engineers.



EDB Customer Support Portal for Customer Portal Testing Account | Test company

Search


### Create new ticket for Customer Portal Testing Account

Production impact assessment Step 2 of 4

**Service level\***

- S1: Emergency, system down and/or losing data
- S2: High, system severely impacted and risk of data loss
- S3: Medium, partial or non-critical functionality loss which can be avoided
- S4: Low, best practice question or recommendation required

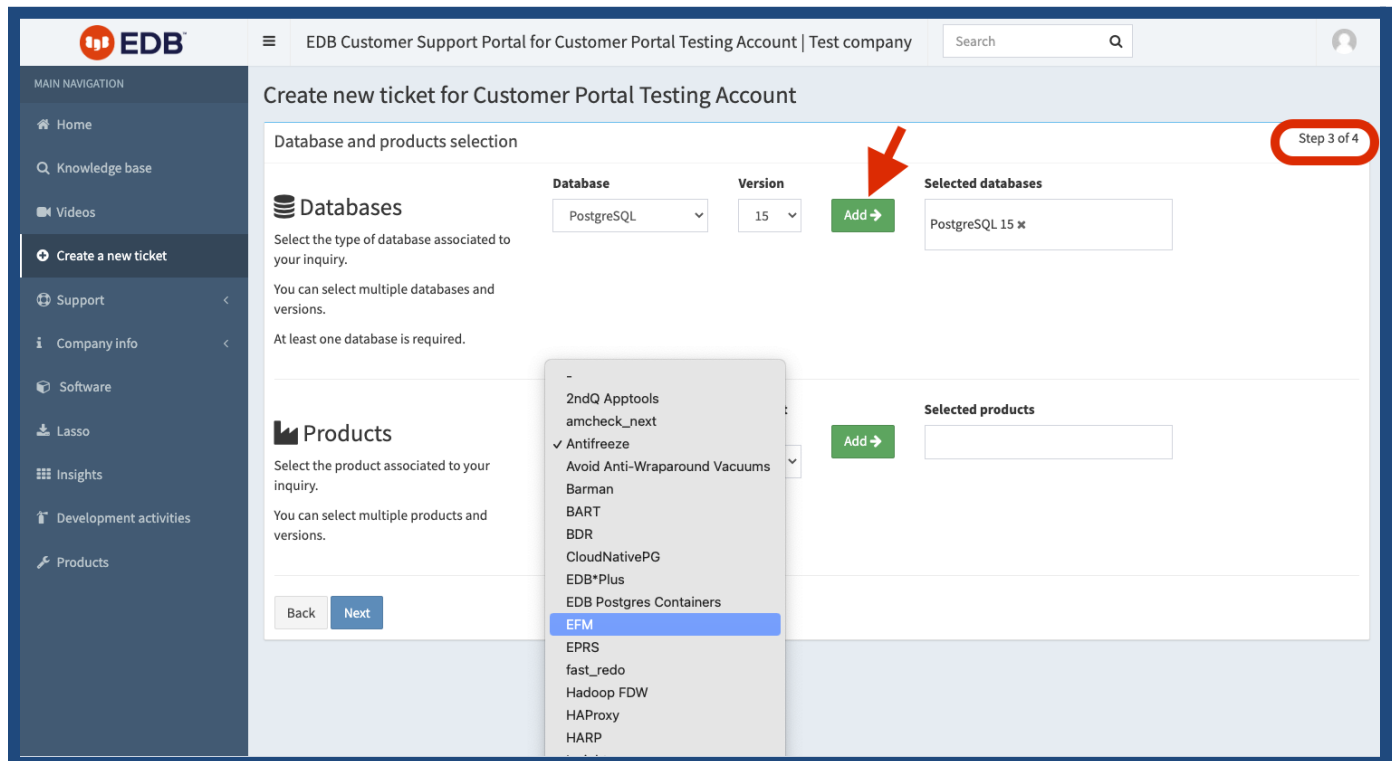
Back Next



### Step 3: Identifying the products involved

In this step, you simply select what database and products are involved in your issue. Choose from the dropdown picklist by clicking on the item and then moving it over using the 'Add' button.

Please select all that apply. Multiple selections are allowed. If you make an error, click on the 'X' to remove that item from the buckets on the right-hand side. Once you have completed the selection, click 'next' to continue.



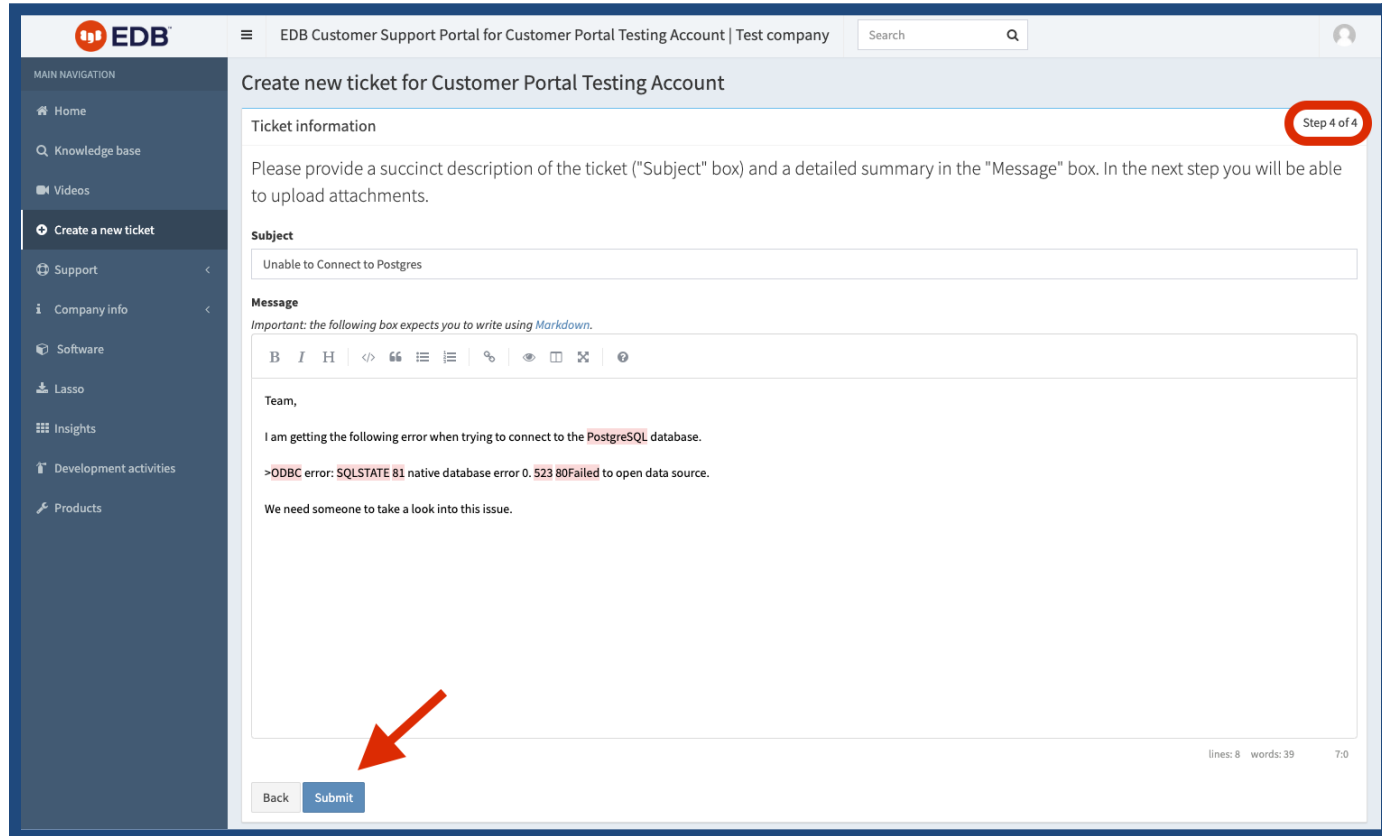
The screenshot displays the 'Create new ticket for Customer Portal Testing Account' page. The 'Database and products selection' section is active. Under 'Databases', 'PostgreSQL' is selected in the dropdown, and '15' is selected in the 'Version' dropdown. A red arrow points to the green 'Add' button. The 'Selected databases' list contains 'PostgreSQL 15 x'. Under 'Products', a dropdown menu is open, showing a list of products including 'Antifreeze', 'EFM', 'EPRs', and others. The 'Selected products' list is currently empty. A 'Next' button is located at the bottom of the selection area. A 'Step 3 of 4' indicator is visible in the top right corner.

### Step 4: defining the issue

In this step, you must provide a subject and a thorough description of your issue.

It is important that you provide us with the most detailed and accurate information you have available at the onset of the ticket in order to facilitate our initial diagnosis and reduce the time to resolve the incident. You can use [Markdown](#) to write text in the Portal. Attachments can be uploaded as noted in Step 4.

**Once submitted, the ticket is immediately created, and our engineers on shift will be alerted to your issue. Our support engineers will contact you as quickly as possible and in accordance with the severity of the incident your contracted service levels to solve the ticket.**



EDB Customer Support Portal for Customer Portal Testing Account | Test company

Search

### Create new ticket for Customer Portal Testing Account

Step 4 of 4

Ticket information

Please provide a succinct description of the ticket ("Subject" box) and a detailed summary in the "Message" box. In the next step you will be able to upload attachments.

**Subject**

Unable to Connect to Postgres

**Message**

Important: the following box expects you to write using *Markdown*.

**B I H** </> ¶ ☰ ☷ 🔗 📎 🗑️

Team,

I am getting the following error when trying to connect to the PostgreSQL database.

>ODBC error: SQLSTATE 81 native database error 0. 523 80Failed to open data source.

We need someone to take a look into this issue.

lines: 8 words: 39 7:0

Back Submit

#### Step 4: Attaching evidence

Once the ticket is created, you can attach relevant documents to the ticket using the "Attachment" feature. The most common examples of evidence that are attached to a ticket are log files, configuration files, core dumps, and/or data collection files (see the following section).

Files are stored and encrypted in our infrastructure, and can only be read by you and our support engineers.

You can also go directly to the ticket by clicking on the ticket number (blue hyperlinked text). This will take you to the details of the ticket you just created.





**EDB** EDB Customer Support Portal for Customer Portal Testing Account | Test company

**Support ticket #90147 for acme**

**Initial data**

We have received your request and created support issue#90147. Our support engineers have already been notified.

In the meantime, please attach any relevant evidence (such as log files, configuration files, Lasso reports, and so on) in order to speed up the diagnosis process. Thank you.

If you upload a [Lasso report](#) be sure you do NOT modify its contents nor rename its file.

**Attachment**

No file chosen

[+ Add another attachment](#)

**REMINDER**  
Please be sure to review attachments for sensitive data such as PII and redact appropriately prior to uploading. All data shared with EDB is confidential and secure.

## Lasso

The EDB Customer Support Portal offers you access to the latest version of our Lasso tool, an exclusive customized application available for your use via an authentication token unique to your company.

EDB's Lasso is an executable program designed to run on your PostgreSQL, Advanced Server, Extended Postgres, EDB Postgres Distributed, and Barman systems. It gathers relevant information that our support engineers can use to diagnose and solve the problem you are experiencing

**NOTE: we deliberately avoid collecting any sensitive data, such as passwords or records contained in your database.**

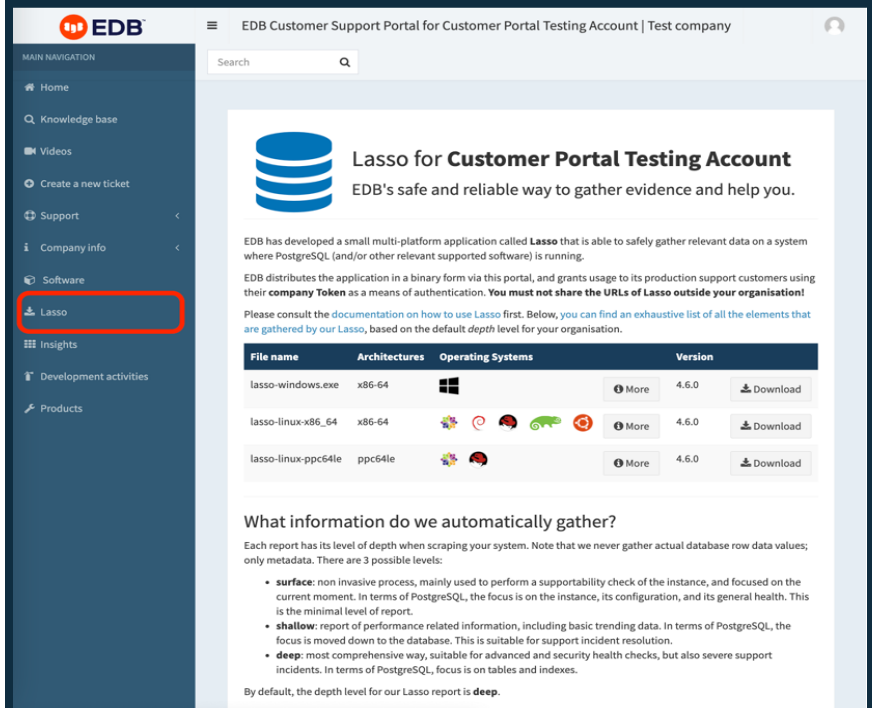
Lasso generates an artifact in the form of a compressed tarball (a .tar.bz2 file) which you can inspect before attaching it to a new or an existing ticket. The tarball is stamped with a checksum that verifies the integrity of the content, reducing the risk of anyone tampering with it during transmission to us.

Lasso is available for Linux systems and Windows systems. The source code can be inspected upon request if you need to vet Lasso for data protection and security auditing.

It is also important to note that running the Lasso tool on your systems is not mandatory, and you can refuse to do so, however failure to not run it and provide results to the EDB Support team may significantly impact our ability to resolve your problem; as such, any SLA obligations will become SLO goals for each case in which a current Lasso payload is not provided. You can also choose to disable external network access altogether from the binary of the data collector you download from the Portal.

Lasso is a requirement for **Insights**, a web-based service that provides Server Advisory Reports for your PostgreSQL infrastructure. (See the section titled 'Insights' for more information.)

Also, Lasso focuses on gathering information related to the Operating System and PostgreSQL configuration and metrics, without collecting any sensitive data from your system. You can find more details of what is actually collected by checking the [Lasso documentation page](#).



EDB Customer Support Portal for Customer Portal Testing Account | Test company

MAIN NAVIGATION

- Home
- Knowledge base
- Videos
- Create a new ticket
- Support
- Company info
- Software
- Lasso**
- Insights
- Development activities
- Products

Search

### Lasso for Customer Portal Testing Account

EDB's safe and reliable way to gather evidence and help you.

EDB has developed a small multi-platform application called **Lasso** that is able to safely gather relevant data on a system where PostgreSQL (and/or other relevant supported software) is running.

EDB distributes the application in a binary form via this portal, and grants usage to its production support customers using their **company Token** as a means of authentication. **You must not share the URLs of Lasso outside your organisation!**

Please consult the [documentation on how to use Lasso](#) first. Below, you can find an exhaustive list of all the elements that are gathered by our Lasso, based on the default *depth* level for your organisation.

File name	Architectures	Operating Systems	Version
lasso-windows.exe	x86-64		4.6.0 <a href="#">More</a> <a href="#">Download</a>
lasso-linux-x86_64	x86-64		4.6.0 <a href="#">More</a> <a href="#">Download</a>
lasso-linux-ppc64le	ppc64le		4.6.0 <a href="#">More</a> <a href="#">Download</a>

#### What information do we automatically gather?

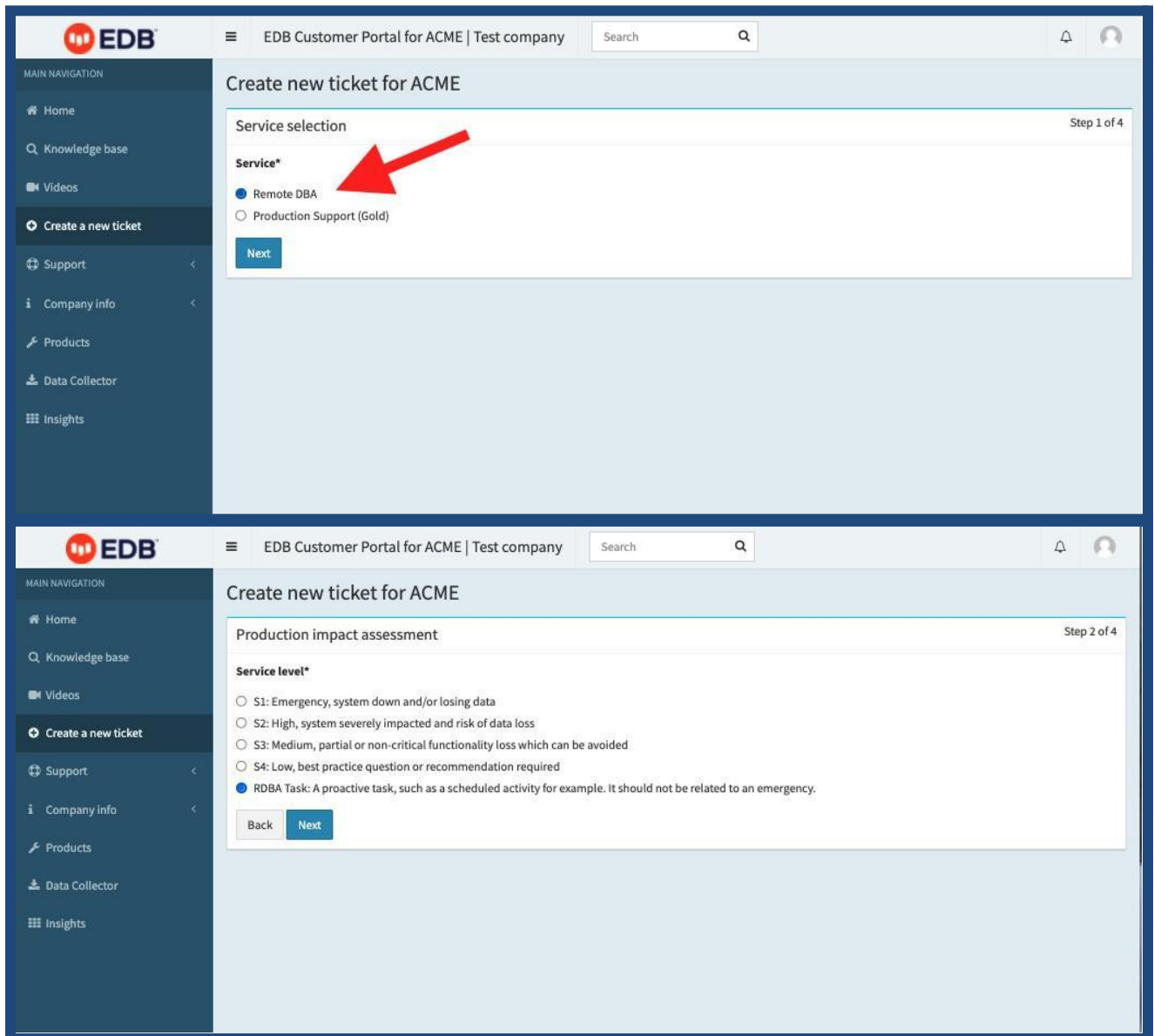
Each report has its level of depth when scraping your system. Note that we never gather actual database row data values; only metadata. There are 3 possible levels:

- surface:** non invasive process, mainly used to perform a supportability check of the instance, and focused on the current moment. In terms of PostgreSQL, the focus is on the instance, its configuration, and its general health. This is the minimal level of report.
- shallow:** report of performance related information, including basic trending data. In terms of PostgreSQL, the focus is moved down to the database. This is suitable for support incident resolution.
- deep:** most comprehensive way, suitable for advanced and security health checks, but also severe support incidents. In terms of PostgreSQL, focus is on tables and indexes.

By default, the depth level for our Lasso report is **deep**.

## Creation of a new Remote DBA Ticket

For creating a Remote DBA issue, where an Issue is defined as a problem, you must select the appropriate service (RemoteDBA), and then the ticket type with a Severity Level of 1-4 as defined previously. You may then follow the steps outlined above for a Technical Support ticket.



The image displays two screenshots of the EDB Customer Portal interface for creating a new ticket for ACME.

**Top Screenshot (Step 1 of 4):** The page title is "Create new ticket for ACME". The "Service selection" section is active. Under "Service\*", the "Remote DBA" option is selected with a radio button, and a red arrow points to it. The "Production Support (Gold)" option is unselected. A "Next" button is visible below the options.

**Bottom Screenshot (Step 2 of 4):** The page title is "Create new ticket for ACME". The "Production impact assessment" section is active. Under "Service level\*", the "RDBA Task: A proactive task, such as a scheduled activity for example. It should not be related to an emergency." option is selected with a radio button. Other options include "S1: Emergency, system down and/or losing data", "S2: High, system severely impacted and risk of data loss", "S3: Medium, partial or non-critical functionality loss which can be avoided", and "S4: Low, best practice question or recommendation required". "Back" and "Next" buttons are visible below the options.

For the creation of a Remote DBA, where a Task is defined as an action or request for action to a member of the Remote DBA teams, please ensure that you select the appropriate service (RemoteDBA), and then the appropriate ticket type (Task). Please identify the appropriate product(s) and version(s), and provide as much detail as possible related to the task itself. You may then select "Submit", and the Remote DBA team will engage as appropriate for the task request.



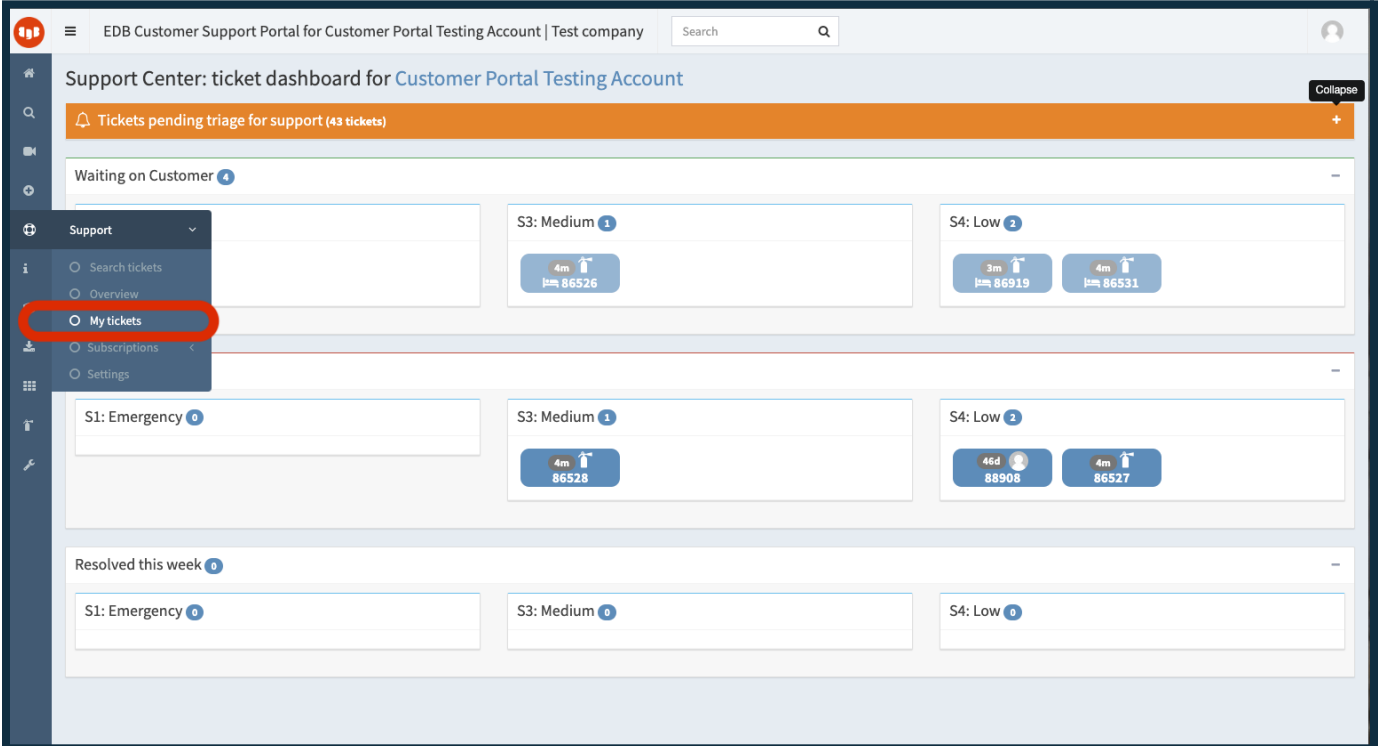
## Management of existing tickets

The Customer Support Portal provides support customers with several dashboards displaying all currently active tickets, as well as resolved ones.

- **Search Tickets:** a detailed view of all your company tickets current and historical.
- **Overview:** a high-level perspective of active and resolved tickets
- **My Tickets:** a *Kanban*-like visualization of the board showing who is needed for the next reply.

The screenshot displays the EDB Customer Support Portal interface. At the top, there is a search bar and a user profile icon. The main content area is titled "Search my tickets" and includes a search input field with the placeholder text "Search in messages, subjects, tags and products. Filter with tag:, product:, ...". Below the search bar, there is a "Filter by:" section with a dropdown menu. The dropdown menu is open, showing options: "Support", "Search tickets", "Overview", "My tickets", "Subscriptions", and "Settings". The "Support" option is highlighted with a red box. Below the dropdown, there are sections for "Escalated only", "Departments", and "Severity Level". The "Departments" section has checkboxes for "Support", "Remote DBA", "Spanish Support", and "Consulting". The "Severity Level" section has checkboxes for "S1 - Emergency", "S2 - High", "S3 - Medium", "S4 - Low", "Task - Proactive", and "Task - Proactive". The main area displays a table of tickets with columns: ID, Status, Subject, Created, Last update, and Severity. The table contains 15 rows of ticket data. At the bottom right, there is a pagination control showing "1/4" and a "Next" button.

ID	Status	Subject	Created	Last update	Severity
90147	1	Unable to Connect to Postgres <span>EFM 4 PostgreSQL 15</span>	2023-02-07 22:01 UTC	22 minutes ago	Production S3
89970	1	TEST <span>PostgreSQL 13 BDR 4</span>	2023-02-02 10:57 UTC	5 days, 11 hours ago	Gold S4
89895	1	test - please ignore <span>EFM 4 BDR 4 PostgreSQL 15</span>	2023-01-31 20:53 UTC	1 week ago	Production S3
89762	1	test <span>EFM 4 PostgreSQL 14 EPAS 14 PEM 8</span>	2023-01-26 10:24 UTC	1 week, 5 days ago	Production S4
89759	1	test <span>Barman EFM 4 PostgreSQL 14 PostgreSQL 15</span>	2023-01-26 08:34 UTC	1 week, 5 days ago	Production S2
89699	1	TEST TICKET <span>Barman PostgreSQL 15</span>	2023-01-24 11:01 UTC	2 weeks ago	Production S4
89570	1	test - please ignore <span>EFM 4 PostgreSQL 15</span>	2023-01-19 17:57 UTC	2 weeks, 5 days ago	Premium S3
89567	1	prova <span>EPAS 14</span>	2023-01-19 16:23 UTC	2 weeks, 5 days ago	Production S1
89523	1	TEST - Barman PG13, question <span>Barman PostgreSQL 13</span>	2023-01-18 11:09 UTC	2 weeks, 6 days ago	Gold S4
89456	1	test <span>EFM 4 Lasso EPAS 14</span>	2023-01-16 16:53 UTC	3 weeks, 1 day ago	Production S3
89362	1	Test - sample ticket <span>EFM 4 PostgreSQL 14 Lasso</span>	2023-01-12 16:02 UTC	3 weeks, 5 days ago	Production S3
89278	1	TEST TICKET <span>HARP EPAS 14</span>	2023-01-10 10:38 UTC	4 weeks ago	Premium S4
89235	1	Test <span>Barman PostgreSQL 13</span>	2023-01-09 10:41 UTC	4 weeks, 1 day ago	Production S4
89202	1	Test - sample ticket <span>BDR 3.7 EPAS 13 pgBackRest 2.38</span>	2023-01-06 17:34 UTC	1 month ago	Production S3
89193	1	TEST TICKET <span>Barman PostgreSQL 15</span>	2023-01-06 10:57 UTC	1 month ago	Premium S4



The ticket details page reports all relevant information, including:

- the subject of the incident
- service level
- current status, reporting relevant stages like triage, mitigation, and resolution
- metadata, including product, tags, related tickets, related documents, and knowledge base articles
- full timeline of the incident, with all correspondence that occurred between you and EDB's response team (including attachments)
- effective summaries in the form of CAN reports (CAN stands for Conditions, Actions, and Needs)

There are two ways for you to interact with /reply to a ticket:

1. **via the Portal** (preferred), using [Markdown](#) syntax and secure upload of attachments, without size limitation. Just navigate to the ticket inside the portal and click the **'Reply'** button found in the upper right corner.
2. **via email**, using one of your registered email addresses in the Portal (for data protection purposes, we cannot accept emails from unknown recipients). Your reply to the email you received from EDB support will populate in the portal under your specific ticket.

The Portal interface guides you through the ticket life cycle, enhancing communication and the coordination of activities between your organization and EDB's team.



This is especially crucial with priority tickets, such as S1 and S2, where **time** is critical and our **joint initial goal** must be to restore your service as quickly as possible (“*how do we fix it?*”), and then to worry about the root cause (“*why did it break?*”). In such cases, we first propose a workaround to mitigate the issue. Similarly, the resolution will need to be accepted by you before the ticket can be closed.

Any ticket can be reopened from the Portal interface within three days of its resolution. After that, you can create a “follow-up” ticket.

Furthermore, the Portal allows you to:

1. Receive the required attention of your EDB account owner on a specific ticket
2. Leave your feedback about the ticket experience
3. Obtain a summary of the ticket, including symptoms, root cause, and relevant timeline
4. Export in CSV format all your tickets, based on search and filter criteria

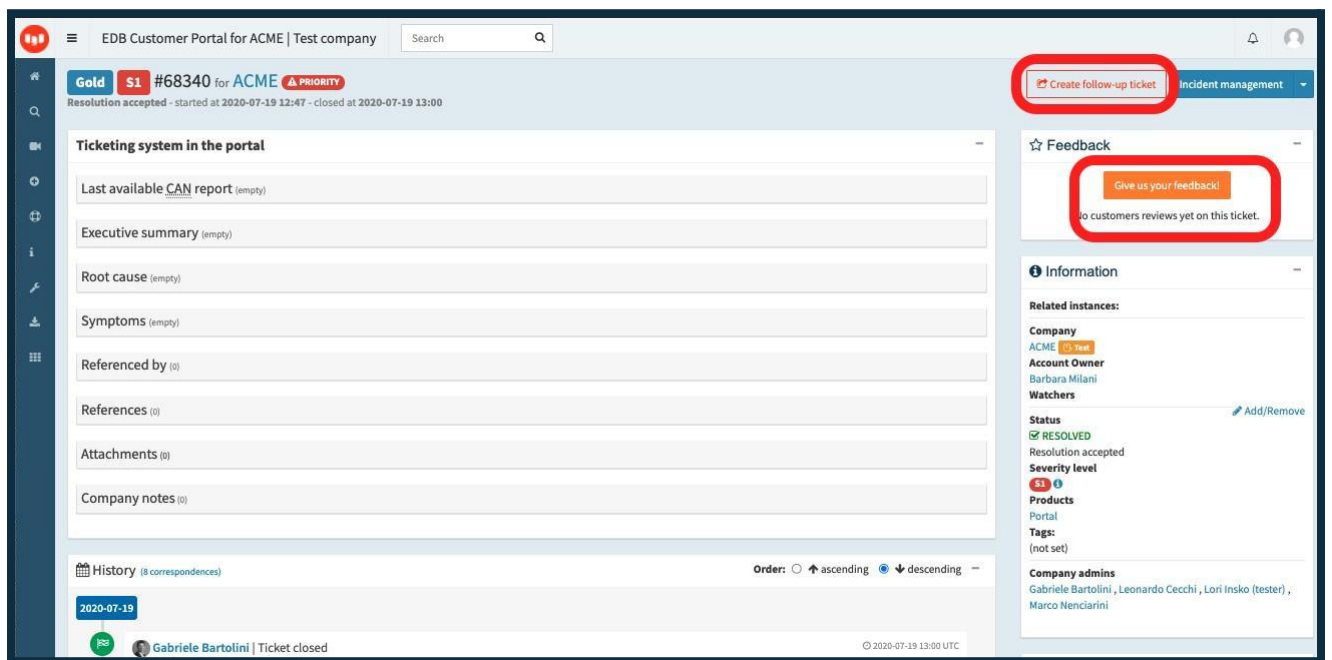
## Ticketing system configuration

- By default, every authorized Portal user from your company will receive emails about any ticket interaction.
- Your company administrator can disable this setting and request that correspondence be received by just the user that opened the ticket (*requester*) and, if needed, additional users (for example, the CTO, the CIO, or the DBA team leader).

A screenshot of the EDB Customer Support Portal interface. The page title is "Support Center: Ticketing System Settings for Customer Portal Testing Account". The main content area is titled "Email settings" and contains three checkboxes: "Send any ticket correspondence to every member of the company" (checked), "Ticket email correspondences" (checked), and "Ticket email notifications" (unchecked). Below the checkboxes is a "Submit" button. On the left sidebar, the "Settings" option is highlighted with a red rectangle. The top navigation bar includes the EDB logo, a search bar, and a user profile icon.



- Every authorized user can read the ticket via the Portal, and reply. Every user that replies to a ticket will also receive email notifications from that moment on for the life of the ticket.
- You can also subscribe to the ticket communication by using the “Watchers” feature from the “Incident management” menu of the ticket page, and become an observer.
- Company administrators can decide whether users in their company receive just notifications and/or also full correspondences via email.





**Insights** (exclusive for EDB customers) is a web-based service that provides **Server Advisory Reports** for your PostgreSQL infrastructure and enhances your Production Support experience.

In a nutshell, Insights is activated by executing the Lasso tool on an instance in your data center and uploading the resulting collection directly from the server or via our Portal. Currently, Lasso works with PostgreSQL, Extended Postgres, Advanced Server, EDB Postgres Distributed, and Barman.

Our Insights engine parses the collection, stores its relevant sections in a database, and inspects its content by running rules specifically designed by EDB engineers. The results are presented shortly after in the Portal.

Your Insights Dashboard can be accessed at <https://techsupport.enterprisedb.com/insights/>.

Insights allows you to keep an inventory of your instances in our Portal, add relevant information such as label, description, environment (development, pre-production, or production), and associate a specific production support subscription.

**BEST PRACTICE TIP:** Add a weekly cron job on your designated servers that download the collector and executes it with the --upload option to benefit from:

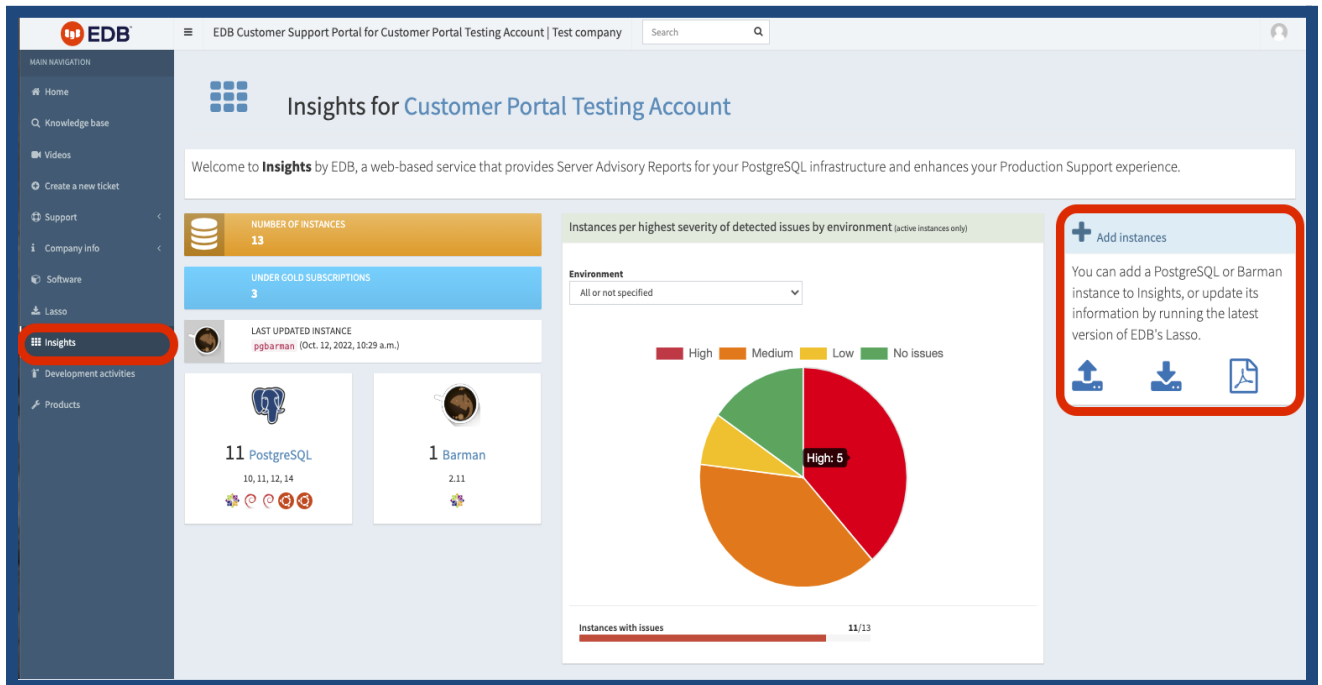
- new rules that have been developed in the meantime
- notification of security updates
- providing timely information to support engineers in case of support incidents that can dramatically reduce resolution times and unnecessary exchanges of information.

## How to add a new instance to Insights

New instances are added to Insights each time a Lasso file is either executed in a new instance using the upload option or when a Lasso file is attached to a ticket.

It is also possible to use the link “Upload a collection” directly through your [Insights Dashboard](#) in the Portal. For more details, please read our [Lasso documentation](#).





The screenshot shows the EDB Insights dashboard. The left sidebar has the 'Insights' menu item highlighted with a red circle. The main content area includes a header 'Insights for Customer Portal Testing Account', a welcome message, and several data cards: 'NUMBER OF INSTANCES' (13), 'UNDER GOLD SUBSCRIPTIONS' (3), and 'LAST UPDATED INSTANCE' (pgbarman). A central pie chart shows the distribution of issue severities: High (5), Medium, Low, and No issues. A right-hand panel titled 'Add instances' is also highlighted with a red circle, containing instructions on how to add or update instances.

**NUMBER OF INSTANCES**  
13

**UNDER GOLD SUBSCRIPTIONS**  
3

**LAST UPDATED INSTANCE**  
pgbarman (Oct. 12, 2022, 10:29 a.m.)

**11 PostgreSQL**  
10, 11, 12, 14

**1 Barman**  
2.11

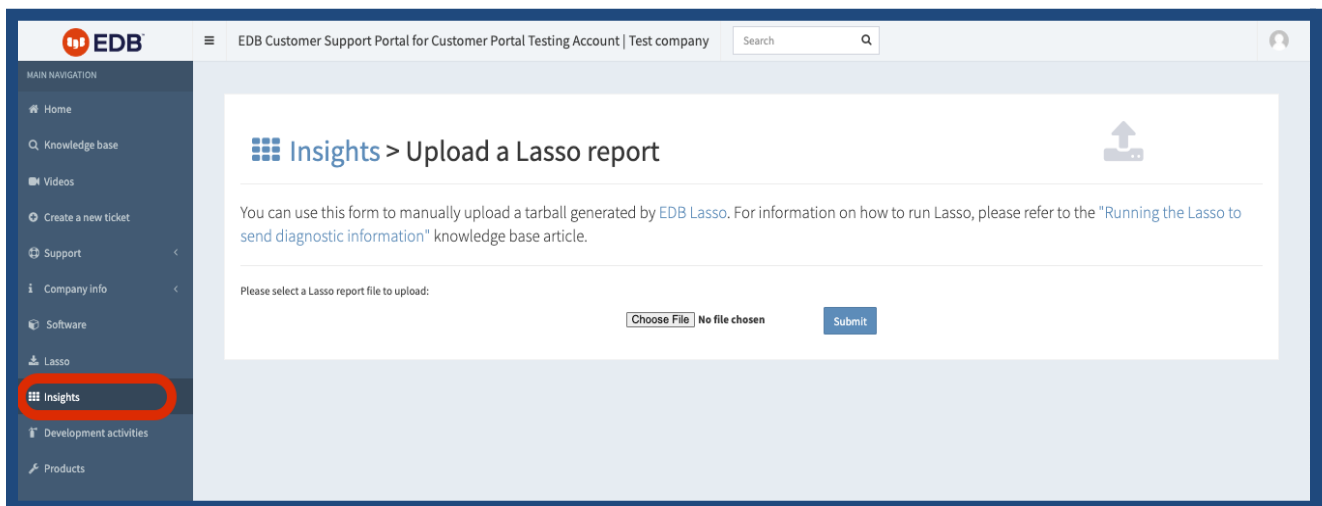
**Instances per highest severity of detected issues by environment** (active instances only)

Environment: All or not specified

High: 5

Instances with issues: 11/13

**+ Add instances**  
You can add a PostgreSQL or Barman instance to Insights, or update its information by running the latest version of EDB's Lasso.



The screenshot shows the 'Upload a Lasso report' page in the EDB Insights portal. The left sidebar has the 'Insights' menu item highlighted with a red circle. The main content area features a title 'Insights > Upload a Lasso report', a description of the upload process, and a file selection interface with a 'Choose File' button, 'No file chosen' text, and a 'Submit' button.

**Insights > Upload a Lasso report**

You can use this form to manually upload a tarball generated by EDB Lasso. For information on how to run Lasso, please refer to the "Running the Lasso to send diagnostic information" knowledge base article.

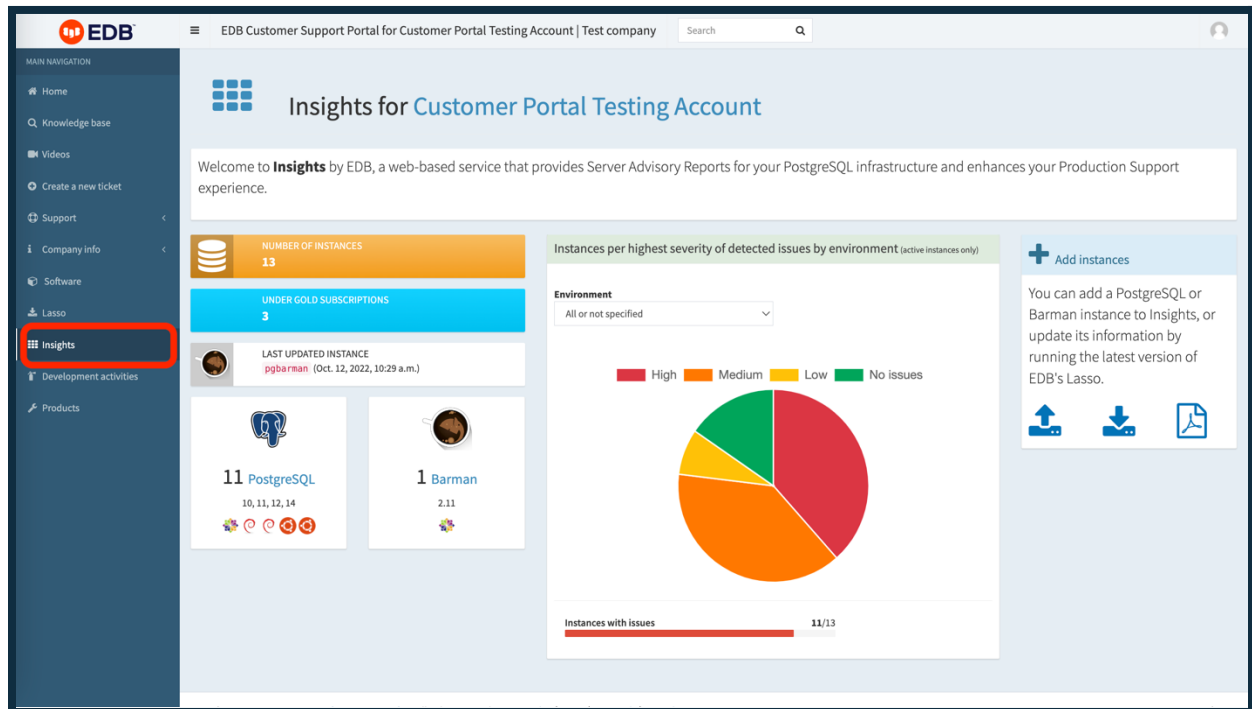
Please select a Lasso report file to upload:

Choose File | No file chosen | Submit

## Insights Dashboard

The Insights Dashboard gives a quick view of your Insights data - the number of instances included, the last instance to be uploaded, the breakdown of all instances, and an easy visual view of the highest severity test warnings for your instances, along with quick links to upload an instance, download the latest Data Collector, or access the Data Collector User Guide.

Follow the PostgreSQL or Barman links to go to the list of all your instances of that type.



## How to manage your instances

You can record more details against each instance that are listed, and this data will persist for all future uploads for that particular instance. By selecting the “Edit instance details” icon at the right of the list, you can add a label, select an environment, and select the relevant subscription type. You can also provide a longer text description for any relevant notes for yourselves or for EDB Support engineers in the event of a ticket. You can also add tags to help identify the instance role or products used.

## Tests

When instances are uploaded into Insights the data is passed through an ever growing list of tests that check your instance against our best practice recommendations. These are reported as either a pass or a



failure with a warning that indicates the severity of the failure.

Tests are either automated or semi-automated.

An automated test gives a very clear pass/fail result based purely on the information contained within the data collection upload.

A semi-automated test provides information that parameters are outside of the expected, but human interpretation given other information which is not included in the data collection is required to be able to confirm whether or not the failure needs action to be taken.

The number of tests run over the data is continually being increased in order to further improve the benefits of Insights. Some of the tests currently included are:

- Up-to-date PostgreSQL minor release: Verifies that the installed version of PostgreSQL is the latest maintenance update for that major version. Minor updates contain bug fixes as well as security fixes to known *Common Vulnerabilities and Exposures* (CVE).
- Autovacuum enabled: Checks that the autovacuum daemon is enabled.
- Danger of xid wraparound: checks for danger of xid wraparound.
- Transparent Huge Pages (THP): These are enabled by default in most recent Linux installations, but for PostgreSQL workloads, we suggest disabling THP. This test checks and makes recommendations.
- Number of connected PostgreSQL clients: Check the number of PostgreSQL backends connected to the server at the time of collection. If it is higher than 95% of `max_connections - superuser_reserved_connections`, a critical issue is raised, whereas a warning is raised if it is higher than 75%.
- Sensible shared buffers amount: Check that shared buffers of the PostgreSQL server are properly sized, based on general purpose heuristics that consider the available RAM size.



## How to acknowledge detected issues

If an instance is showing a test failure, you can investigate whether or not that failure is a problem that needs to be addressed within your environment or not. If the investigations result in acceptance that the failure is not problematic for you, or otherwise is not going to be corrected, you can *acknowledge* that failure to silence it. This means that all subsequent failures of this test will not be displayed unless you specifically tick the “Show acknowledged tests” box.

Please be aware that silencing test failures mean that the silenced test will not be highlighted even if the severity of the failure is heightened in the future given any changes to the instance.

## Periodic updates

You can set up a cron job in your PostgreSQL servers (as a postgres user) or Barman installations (as Barman user) that, once a week, downloads the collector, executes it with the --upload option, and removes the collector.

If you plan multiple collections from your infrastructure, please schedule them at different intervals.

This operation might require your security department to open up outgoing TCP connections to the 443 port for a few of our servers. Please consult the guide of the [Lasso](#) for details and a list of IPv4 and IPv6 addresses.

## Additional help

We invite you to check the Knowledge Base articles [Insights for Customers](#) and [Running Lasso to send diagnostic information](#), which can give other related details.

And, of course, if this guide was not sufficient, please feel free to file a new support ticket stating your request or questions or contact [customercare@enterprisedb.com](mailto:customercare@enterprisedb.com).



## Data protection

Data protection is extremely important to EDB. Data collected using the Lasso tool can be uploaded via the Portal or directly using the --upload option.

Via the portal: the file is directly sent by the browser to encrypted S3 buckets on AWS facilities, and the central Insights system is notified about the presence of a new collection.

Directly: collections are sent to any of the front-line application servers of Insights, and temporarily stored for the time required to load them in our central PostgreSQL database. After being processed, they are then relayed to the same S3 buckets.

All our servers require TLS 1.2 or higher for network communications and storage is encrypted at rest.

Our PostgreSQL databases store general information about the database, with the sole purpose of providing you with a better experience with our Production Support services.

Also, the Lasso tool focuses on gathering information related to the Operating System and PostgreSQL configuration and metrics, **without collecting any sensitive data from your system.** You can find more details of what is actually collected by checking [the Lasso page](#).