

Customer Care Description of Support Services

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Introduction

This document describes the software maintenance and support services provided by Planview, Inc. and its affiliates and subsidiaries (“Planview”) to Customers who either purchase support services from Planview or are a current Planview software-as-a-service (“SaaS Service”) Customer (“Customer”). This document includes the following information:

- Standard practices in providing software updates or patches to Planview’s software or SaaS Services;
- Process by which Planview receives and responds to Customer-submitted requests for support services;
- Customer Care hours of operation;
- Standard service level targets in providing software support services; and
- Software Defect¹ analysis processes.

Support Services

Customer Care services addresses software issues encountered by users of Planview’s software and/or SaaS Services applications which are submitted to Customer Care by a defined application administrator or Authorized User. The following support services are provided for each new software update or patch:

- Unlimited calls to Planview Customer Care during business hours;
- Case submission via web, email or phone;
- Case submission via chat are limited to Planview Spigit and Planview Projectplace;
- Scheduled updates to the software;
- Scheduled updates to released documentation.

Services Outside of the Scope of Customer Care

Please note that these cases are not related to or covered by the support service-level targets (as opposed to uptime to Cloud Operations service-level targets) described in this document.

- Functional Support – These are questions about how a particular function or feature of the software or SaaS Service works. Functional questions submitted to Customer Care may be directed to Planview Consulting via the assigned Customer Success Manager or Managing Consultant. The services provided by Planview Consulting may be billable.
- Custom Reports & Self-Installs - Customer Care will provide up to one cumulative hour of assistance, per instance, for issues or questions related to custom reports or self-installs. Assistance by Customer Care beyond one hour is considered billable and will be referred to Planview Consulting.
- Cases that are routed to Planview Consulting can be accessed via: <https://support.planview.com>

¹ “Software Defect” is defined on page 12.

Case Submission Process

Customers may submit cases to Customer Care via the methods below. Please note that Customer Care *only* provides support services to defined application administrators for Planview Enterprise One and Planview PPM Pro.

- **Customer Care Community** – Customers may log in to the Customer Care website and submit a case 24/7. The Customer Care Community may be accessed via:

<https://support.planview.com>

When logging into the Customer Care Community, users will be prompted to supply their email address and password.

- **Telephone** – Customers may call Customer Care. See Communication Matrix (Appendix 1)
- **Email** – Customers may send requests via email. Case requests are received by the Customer Care Dispatcher who will create a case, which is then automatically routed to a Customer Care consultant.
- **Chat** - Chat requests are only available for Planview Projectplace and Planview Spigit. Chats can be initiated during normal business hours via the product UI or at:
 - Planview Projectplace - <https://lc.chat/now/8700631/>
 - Planview Spigit – via product UI
- **Platinum Support** – 24x7 Coverage – Customers who have elected to purchase an upgrade to Platinum Support will be provided an on-call phone number for critical severity cases. The on-call phone number shall be provided to the Customer upon purchase of the Platinum Support offering. The customer may make use of this number to contact a Level II Customer Care Consultant during off-hours.

Planview Customer Care provides support for (1) the latest and (2) the most recent previous release. With regard to our multitenant solutions (Planview Leankit, Planview Spigit, Planview Projectplace), the option for previous versioning support is not applicable. Once a software version is no longer covered, Customer Care will escalate requests to Product Management for review and consideration and Customer Care will provide a comprehensive response.

Case Closure Policy

All cases will be marked as “Solution Provided” upon delivery of a resolution or fix. This includes, but is not limited to:

- Answers to general questions;
- Detailed steps/actions to address the reported issue;
- Release of an update or patch that addresses the reported issue; and/or
- Customer advises that the issue can be marked as Solution Provided;

Cases will be moved to a status of “Closed” when the proposed solution is accepted by the Customer via the Customer Care Community or there is no response from a Customer for ten (10) business days (after two (2) follow-up attempts via email). Any closed cases can be re-opened by the Customer or by Planview upon request.

Severity of Support Service Requests

Customer must set a severity for each case submitted. The severity should be set when creating a case via the Planview Customer Care portal. Customer may change the severity of any open case by adding a comment to the case and requesting the change or by contacting Planview Customer Care via email or phone. Requests to raise the severity to Critical will be reviewed by a Planview Customer Care manager to ensure that the reported issue meets the defined criteria. To make the best use of resources, Planview relies on the severity assigned to each case as a means of determining the order in which to act upon requests. Severity classifications are described in the following tables:

Severity Assigned	Definition
Critical	<p>Down (unavailable) production system or training environment during scheduled training efforts.</p> <p>Issues encountered in a test or development environment and enhancement requests should not be listed as Critical</p> <p>The issue affects critical functionality or critical data. It does not have a workaround. Critical components or application areas are not functioning, and business/decision-making is adversely affected. Ad-hoc Cloud Operations actions should not be classified as Critical severity.</p>
Major	<p>Impaired Planview Software. Critical components or application areas are not functioning correctly, and business/decision-making is affected.</p> <p>The issue affects major functionality or major data. It may have a workaround but is not obvious and is difficult.</p>
Moderate	<p>The issue affects minor functionality or non-critical data. It has an easy workaround.</p>
Minor	<p>The issue does not affect functionality or data. It does not even need a workaround. It does not impact productivity or efficiency. It is merely an inconvenience.</p>

Support Service – Response and Resolution Targets for Planview Software Defects

Severity of Request	Response Time	Target Resolution Time for Reported Cases
Critical	Within 30 minutes	<p>Within 2 Business Days* via a Work-around or Update if there is no viable work-around</p> <p>Reported issue may require assistance from Planview Product Development and the issuance of an update. In these cases, Planview Customer Care will work to provide a temporary work-around until the defect can be addressed via a software update or patch. Customer Care will seek a fix for defects that are prioritized as Critical and target delivery within two (2) business days from the point that the issue is reproduced and confirmed as a software defect by Customer Care and Product Management.</p> <p>* The target resolution time is dependent upon when a customer responds to a request for information. Any time which elapses while waiting for such additional information will not count toward the target resolution time.</p>
Major	Within 1 hour	<p>Targeted for a scheduled update if there is no viable work-around</p> <p>Reported issues may require assistance from Product Development and the issuance of an update. In a High priority case, Customer Care will work to provide a temporary work-around until the defect can be addressed via a software update or patch.</p>
Moderate	Within 2 hours	Targeted for future update
Minor	Within 4 hours	Time permitting

Planview does not provide service level targets for the following defects:

- Software defects in an OEM software products, and
- Any third-party software or application components not developed and maintained by Planview

Support Service – Response and Resolution Targets for Non-Planview Software Defects

Severity of Request	Response Time	Target Resolution Time for Reported Cases
Critical	Within 30 minutes	<p>Note: The resolution may be provided in the form of a viable work-around</p> <p>As soon as possible – worked 24/7 until addressed</p>
Major	Within 1 hour	As soon as possible during defined Support Service hours

Severity of Request	Response Time	Target Resolution Time for Reported Cases Note: The resolution may be provided in the form of a viable work-around
Moderate	Within 2 hours	Time permitting
Minor	Within 4 hours	Time permitting

Planview does not provide service level targets for the following defects:

- Customer networking issues (latency, saturation, firewall/proxy issues, etc.);
- Customer client-side issues (browser, OS, connectivity, etc.);
- Support for customer-created customizations/custom reports/custom views/custom tiles/custom ribbons;
- Questions about “how” to use the software, functional questions, training questions
- Enhancement requests/customization requests;
- Software defects in an OEM software products, and
- Any third-party software or application components not developed and maintained by Planview.

Software Updates or Patches

Customers who purchase Planview Annual Maintenance and Support or are a SaaS-licensed Customer receive new Planview software updates or patches to the software products which they license.

- **Planview Enterprise One/PPM Pro - Monthly Releases** - Planview Enterprise One and PPM Pro follow a monthly release cadence. Release process for each product line can be found below:
 - **Planview Enterprise One**
https://success.planview.com/Planview_Enterprise_One/One/Product_Releases/Planview_Enterprise_One_Update_Process
 - **Planview PPM Pro**
https://success.planview.com/Planview_PPM_Pro/Release_Information/New_sletters_and_Announcements/010_PPM_Pro_Release_Process
- **Planview Projectplace** - Projectplace follows Continuous Integration (CI) / Continuous Delivery (CD) software engineering best practices. This enables updates to Projectplace's services to occur as changes are promoted (e.g. multiple times per day).
- **Planview LeanKit** - LeanKit follows Continuous Integration (CI) / Continuous Delivery (CD) software engineering best practices. This enables updates to LeanKit's services to occur as changes are promoted (e.g. multiple times per day).
- **Planview Spigit** – Spigit follows a release cycle of every two weeks.
 - https://success.planview.com/Planview_Spigit/Technical_Information/03_Maintenance_and_Upgrades/Product_Release_Cycle_Cadence

Appendix 1 – Communication Matrix

Customer Care Support Hours by Product Line and Region				
The Americas/Asia, Pacific (UTC -6:00)				
Planview Enterprise One/PRM	Sunday	5:00 PM to 1:00 AM	Customer Care Community (https://support.planview.com)	
	Monday - Thursday	7:00 AM to 1:00 AM	United States Australia New Zealand	1-512-346-8460 61 2 80149318 64 49 749422
	Friday	7:00 AM to 7:00 PM	customer care@planview.com	
Planview Troux / CTM	Monday - Friday	5:30 AM to 12:00 AM	Customer Care Community Case submission form	
			United States Australia New Zealand	1-512-346-8460 61 2 80149318 64 49 749422
			customer care@planview.com	
Planview PPM Pro	Sunday	5:00 PM to 12:00 AM	Customer Care Community Case submission form	
	Monday - Thursday	7:00 AM to 1:00 AM	United States	1-512-346-8460
	Friday	7:00 AM to 7:00 PM	customer care@planview.com	
Planview Projectplace	Sunday	4:00 PM to 12:00 AM	Customer Care Community Case submission form	
	Monday - Thursday	10:00 AM to 12:00 AM	United States Australia New Zealand	1-512-346-8460 61 2 80149318 64 49 749422
	Friday	10:00 AM to 7:00 PM	support@projectplace.com	
Planview LeanKit	Monday - Friday	5:00 AM to 5:00 PM	Customer Care Community Case submission form	
			United States	1-512-346-8460
			customer care@planview.com	
Planview Spigit	Monday - Friday	7:00 AM to 7:00 PM	Customer Care Community Case submission form	
			United States United Kingdom	1-512-346-8460 44 800 014 8917
			customer care@planview.com	

Europe, Middle East, Africa Hours (UTC +1:00)				
Planview Enterprise One/PRM	Multi-Lingual Support		Customer Care Community Case submission form	
	Monday - Friday	8:00 AM to 6:00 PM	Germany United Kingdom	49-721-95-97-262 44-118-963-7777
			customercare@planview.eu	
Planview Troux / CTM			Customer Care Community Case submission form	
	Monday - Friday	9:30 AM to 5:30 PM	United States Australia New Zealand	1-512-346-8460 61 2 80149318 64 49 749422
			customercare@planview.com	
Planview PPM Pro	Monday - Friday	9:00 AM to 5:00 PM	Customer Care Community Case submission form	
Planview Projectplace	Multi-Lingual Support		Customer Care Community Case submission form	
	Monday - Friday	9:00 AM - 5:00 PM	England Sweden Denmark Norway Germany Netherlands	+44 203 514 59 95 +46 8 586 302 60 +45 8987 1149 +47 21 42 41 40 +49 69 80 883 323 +31 20 808 00 63
			support@projectplace.com & Chat	
Planview LeanKit	None		Customer Care Community Case submission form	
Planview Spigit	Monday - Friday	9:00 AM - 5:00 PM	Customer Care Community Case submission form	

Cases submitted by SaaS Customers will first be responded to by the Customer's primary region and then responded to by the alternate region.

Appendix 2 – Case Types

Type	Description
Issue/Error	Cases regarding an error encountered within the application.
Privacy	Cases regarding privacy of data or company policy.
Integrations	Cases regarding specific integration issues or questions.
Security	Cases regarding company security or application security.
Functional	Cases regarding the use of Planview software. Examples include questions related to functionality, usage, and administration. Examples include issues where the application is not functioning per the provided documentation. Functional issues may not always be due to a software defect but could be due to application configuration or data issues.
Defect	Cases that clearly identify a defect in the software that can be reproduced. A software defect is an error, flaw, mistake, failure, or fault in the application that prevents it from behaving as intended (e.g., producing an incorrect result).
Enhancement	Cases to track requests for application improvements or functionality modifications. Examples include requests to add additional functionality or to change the current behavior of the software.
Performance	Cases to report a server or client-side performance issue with the Planview software.
Cloud Operations	Cases to report an issue or ask a question for a SaaS implementation. For example: database copies, SSO certificate update, service restart or version upgrade.