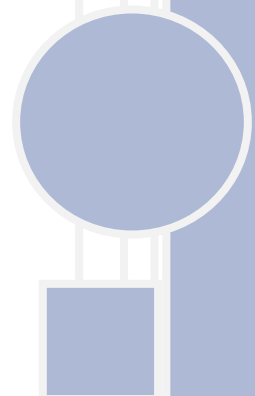




# CUSTOMER SERVICES GUIDE

*Version 1.3 (April 2009)*

This document describes the three different support services provided by ApplyIT, and provides advice on the most appropriate support offering for your company. The three support offerings are Software Maintenance, Service Level Agreements (SLA) and Consulting Services. The workings of the ApplyIT help desk are also covered in some detail to assist you in getting the most from the ApplyIT fault resolution process.



# CUSTOMER SERVICES GUIDE

*Version 1.3 (April 2009)*



Welcome to the ApplyIT community! In order to maximize the value you get from your investment in the ApplyIT Operations Suite, it is important to be familiar with the various types of support services described in this document.

It is ApplyIT's intention to ensure that our products remain top in class, represent best practice, are relevant and add ongoing value to all our clients. We therefore plan continued investment in each of the software modules; and on an ongoing basis will

continue to make these enhancements available to our customers.

By participating in one or more of ApplyIT's customer support programs you stand to benefit from a range of services including product upgrades, on-site support, the opportunity to participate in the future development of new functionality in ApplyIT Operations Suite (AOS) as well as having access to a series of user community programs and events, depending on the options selected.

This document will guide you through ApplyIT's customer support services so that your organisation is better equipped to benefit from the programs available.

In order to maximize the value you get from your investment in the ApplyIT Operations Suite, it is important to be familiar with the various types of support services described in this document.

# SUPPORT OPTIONS

There are three support options available from ApplyIT:

Maintenance	SLA	Consulting Services
<ul style="list-style-type: none"> <li>• Standard software maintenance, covered by Annual Licence Fees (ALF)</li> </ul>	<ul style="list-style-type: none"> <li>• Support Agreement with guaranteed response times.</li> </ul>	<ul style="list-style-type: none"> <li>• Consulting Services based around Operations Suite</li> </ul>

In order to understand these three levels of software support available, it is necessary to distinguish between **The Product** and **The Solution**.

The Product	The Solution
<ul style="list-style-type: none"> <li>• Refers to the compiled version (e.g. 4.3.0) of the standard ApplyIT Operations Suite software, or one of its modules, installed at your premises.</li> </ul>	<ul style="list-style-type: none"> <li>• Refers to the specific solution as implemented on your site. This typically consists of The Product (including configurations) plus any developments, customisations, add-ons and non-standard reports unique to you, as implemented on site.</li> </ul>

These support options are further described in the next section.

## Software maintenance

Software Maintenance applies to **The Product**. You are eligible for software maintenance by paying an Annual License Fee (ALF), in advance. The ALF is calculated as a percentage of the list price of the relevant modules for which you are licensed. ApplyIT invests the largest portion of the ALF into product research and development, enhancements, innovation, improvements, etc.

By paying the ALF for Software Maintenance, you are entitled to the following:

- a. New versions/releases and service packs relating to The Product (note – version updates are distributed at ApplyIT's cost, but any consulting time involved in upgrading a client's system is chargeable).

- b. Corrections to Software defects (hot fixes and patches).
- c. Automated fault reporting
- d. Telephonic product support
- e. Input to potential product enhancements, improvements. (These enhancements and improvements are prioritized for customers on paid up Software Maintenance; however the exact delivery schedule is set by ApplyIT's product development roadmap).

Please note that software maintenance is applicable to **The Product** only. Any support calls that relate to **The Solution** will be charged on a time and materials basis as per ApplyIT's Standard Rates for Service, unless you have concluded a Service Level Agreement defining the terms and conditions of such support. Please note that custom developments/enhancements and non-standard reports are not covered by software maintenance.

## Service Level Agreements (SLA)

A SLA is separate contract between ApplyIT and your company, whereby you purchase additional support services for **The Solution**. By committing upfront to a predicted level of support and response times, it is possible to structure a SLA to be very cost effective and lower risk compared to relying on ad-hoc support.

The following are typically defined in a standard SLA:

- the different roles and responsibilities between your company, ApplyIT and any third party,
- an agreed scope,
- response times, escalation procedures and measures of response effectiveness.

Typical roles that are defined in a standard SLA may be as follows:

**Your company:** Business/System Owner, System Administrator(s), Technical Representative(s), End-Users.

**ApplyIT:** Help Desk Administrator, Support Consultants, Services Manager.

Note: There is often an Intermediary/Outsourced Partner involved and the role of this partner has to be clearly defined (and roles agreed to by the intermediary).

## Product Consulting Services

Additional support is available from certified support consultants, employed by ApplyIT and our partners. During the initial implementation of the solution and thereafter, ApplyIT offers a wide range of professional and other services beyond what is covered by the standard maintenance agreement for AOS.

These services which are available to you include:

- on-site product training and support
- customized training materials
- technical support services including:
  - custom product enhancements
  - network monitoring and support
  - database administration
  - systems integration
  - upgrade services including data conversion
- IT strategy consultation
- operation reviews
- project Management

When additional training or other professional services are required, you should contact your designated ApplyIT account manager to get more information about the available options, as well as the associated costs. The typical terms of Product Consulting Services are in a document "ApplyIT's Standard Terms and Conditions for IT Consulting, System Development and Support"; and the equivalent documents of our certified partners.

Copies of the Standard Terms and Conditions, the End User License Agreement (EULA) and a typical Service Level Agreement can be made available to you upon request.

The continued success of our software solutions is wholly dependent on the quality of our customer relationships. We certainly welcome feedback on any aspect of our products and services and encourage you tell us if we have under-delivered on any initiative.

## THE APPLYIT HELPDESK

The ApplyIT helpdesk is the primary mechanism for coordinating support and for fault reporting and resolution. Experienced consultants can be contacted through the helpdesk and will assist you with functional or technical product issues.

The Helpdesk process handles incoming support calls in two broad categories:

First-tier support	Second-tier support
<ul style="list-style-type: none"><li>• Here a consultant will attempt to telephonically resolve issues as they are reported. Where remote access facilities are available, these can be used to diagnose the problem in more detail and assist in the resolution thereof.</li></ul>	<ul style="list-style-type: none"><li>• If a more detailed investigation is required, the call will be assigned to appropriate second-tier technical staff or functional consultants who are responsible for bringing the issue to a satisfactory conclusion. Functional consultants have in-depth understanding of the business processes, whilst technical staff are responsible for the source code itself.</li></ul>

Information collated from the help desk is extremely valuable and helps build knowledge within the entire customer community. For example, within ApplyIT this information is used to direct the development of new releases of the software, create software modifications, create release notes, improve product documentation, generate conversion scripts, and compile service packs. Common problems are published in a knowledge base.

Please note that calls relating to **The Product** are dealt with under software maintenance, whilst calls relating to **The Solution** are dealt with under a Service Level Agreement.

## Understanding the ApplyIT Call Logging System





The ApplyIT Call Logging System functions as the communication backbone for the overall support services team. Your support information is maintained within this system and is available to any ApplyIT employee who may require it to provide you with support. For example, the call system is often referred to by the ApplyIT on-site services consultants, allowing them to quickly retrieve and review any of your current or past calls.

All customer calls requests are documented and stored in the Call Logging System. This system contains vital information about the issue being reported and who is reporting the issue. The types of issues reported in calls include requests for information, functional questions, technical questions, enhancement requests, and potential software defects. The Helpdesk provides the first level of response and is responsible for working with you to resolve or escalate the call, if necessary, to the software development or ApplyIT's services teams for final resolution.

The term "call" is used to represent an issue or question a user has "logged" when support is requested. Each contact is assigned a "call number", which is used for tracking and administration. It is possible for a customer to have several "open calls" at any given point in time.

A customer may initiate a call to the helpdesk in any of the following ways:

	telephone	+27 (0)31 275 8080
	email	<a href="mailto:support@applyit.com">support@applyit.com</a>

### *Hours of Operation:*

*For all EMEA Customers (Europe, Middle-East and Africa)*

Weekdays 08:00 –17:00 hours CAT, excluding standard South African holidays.

**Telephone / Email:** When logging a call, please be prepared to provide your name, company, telephone number, email address, and complete description of the problem or request. Bear in mind that the more complete your description of the symptoms of the problem, the more efficiently it can be resolved.

## Call Classification and Response

A call may be classified according to **type** and **priority**. The call type indicates the nature of the problem (e.g. AOS bug). Calls from clients with SLA's are guaranteed response times and escalations according to the contract.

Users with a production-critical situation can request immediate telephone support. These contacts always receive the highest priority and are responded to as soon as reasonably possible.

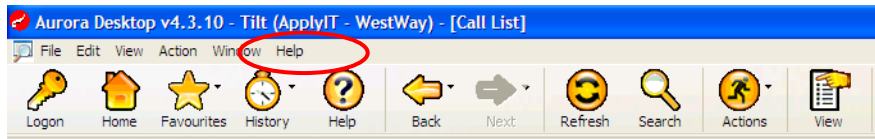
When logging a call, please grade the call accurately according to the business impact as described in the table below:

<b>Priority</b>	<b>Impact</b>
<b>Normal</b>	Impacts one user. Normal Processing error where a work-around exists for completing the transaction.  Functional or technical questions that do not have an immediate impact on the completion of a business event.
<b>Urgent</b>	Error or other system issue that prevents completion of critical business event in a non-production (implementation) environment.
<b>Highest</b>	Error or other system issue that prevents completion of a critical business event in production environment

In order for the Helpdesk to provide prompt, quality service, and to enable the fastest resolution of your problem, calls must include all of the information listed below:





- ❖ Company name and department/s being affected by the fault / error
- ❖ The best time and method to contact the user
- ❖ User contact name, contact number and email address (so that the system can automatically generate progress feedback emails)
- ❖ Concise and informative description of the issue, including the form or process name, table name, and any errors received. If a call has already been logged, please quote the call number when contacting the Helpdesk.
  - If the issue is related to a *suspected defect* this description must include detailed steps to reproduce the problem.
  - If the call is an *enhancement request*, please include the business reason and proposed design
- ❖ Priority classification
- ❖ Product implementation status (e.g., test system, production system)

- ❖ Product name and version (within Ops Suite click Help, click About Aurora to view the version. Click Ok to close)



## Call Escalation

The Call Logging System will automatically escalate the call through the following stages:

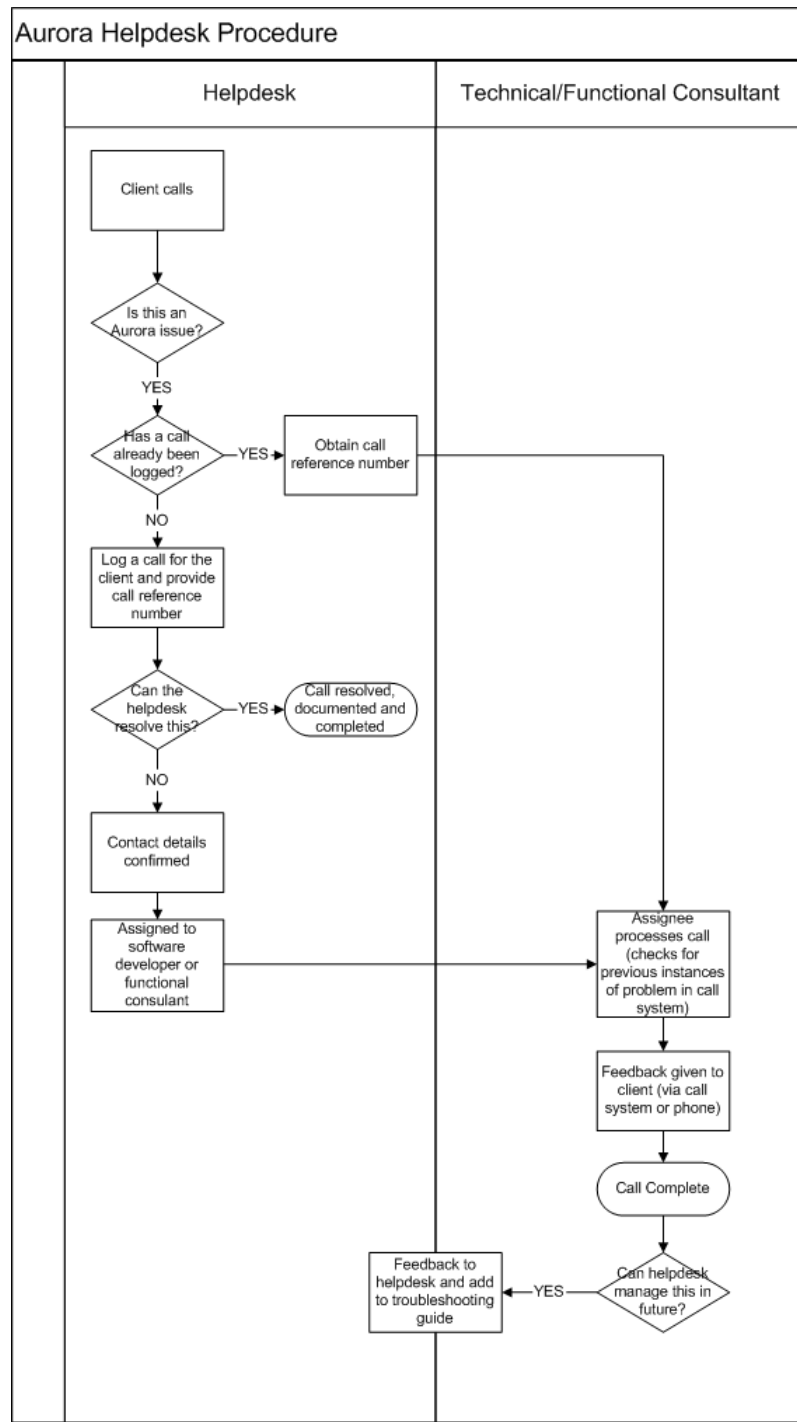
	<b>Yellow</b>	Status of call that has been initiated and assigned to an ApplyIT technical resource or consultant where no escalation has taken place
	<b>Orange</b>	First level of escalation after half the Service Level Agreement time has elapsed
	<b>Red</b>	Status of call if it has not been attended to within the time allowed by the Service Level Agreement
	<b>On hold</b>	A call may be placed on hold while the appropriate resources are being gathered for the resolution of the issue. If a call is placed on hold, a deadline for completion will be provided.

For each IS call, the Helpdesk Coordinator, the assigned Consultant, your Account Manager and ApplyIT's Managing Director will get SMS notifications at the various stages of escalation.

## Call Feedback and Resolution Process

The Call Logging System incorporates an automated feedback mechanism that allows ApplyIT technical staff and consultants to email the status of the call to the initiator.

The following diagram describes the process followed by the Helpdesk to resolve issues and document solutions in the knowledge base:



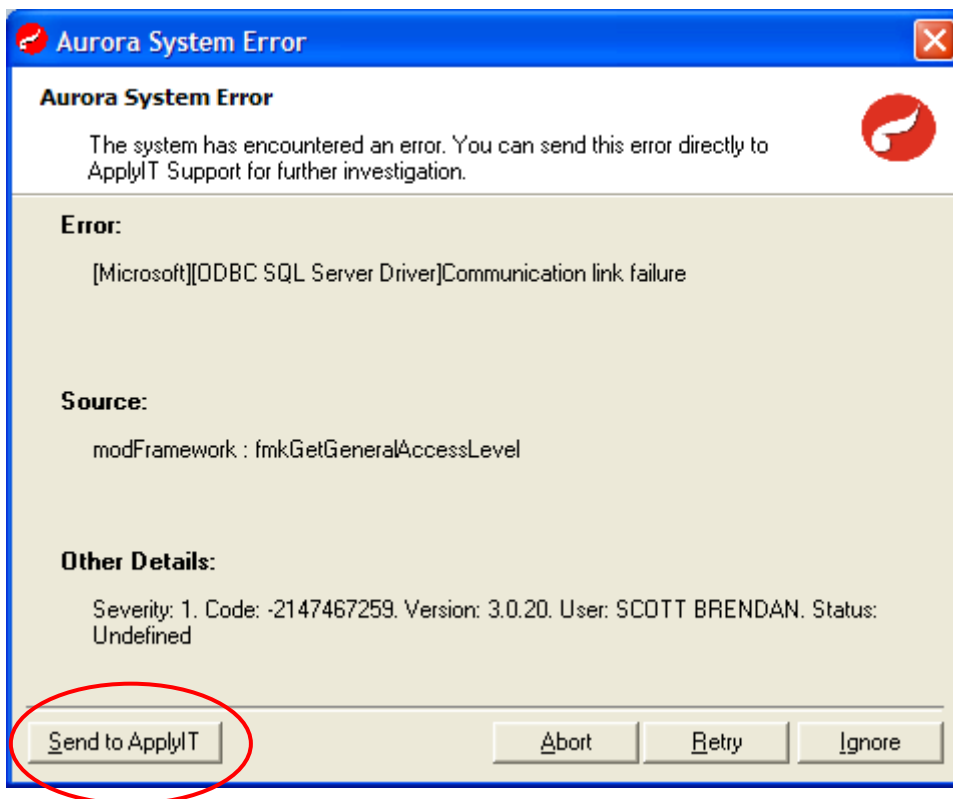
Please note that ApplyIT values the feedback on support calls and has implemented a call rating system whereby Clients are able to rate the quality of service that ApplyIT has provided during the call resolution process.

## Automated Fault Reporting

ApplyIT Operations Suite incorporates a mechanism for the automated reporting of system errors to the Helpdesk. Most of these errors will not prevent the users from continuing with their process. However, in the instance where the fault requires attention, these automated errors can be converted into calls by the Helpdesk.

After an error is reported in the software, and the "Aurora System Error" screen is displayed. Click on the <Send to ApplyIT> button, in order to send the error details to ApplyIT, Then email [support@applyit.com](mailto:support@applyit.com) and requested that a call be logged (relating to this error).

The Error, Source and Details descriptions of this error message (see below) contain vital technical details, which will assist in expediting a resolution.



## Tips When Contacting the Helpdesk

Many customers have found it helpful to:

- ❖ Centralize the management of questions to the Helpdesk, especially during implementation.
- ❖ Check release and update notes before contacting the Helpdesk if possible.
- ❖ Gather detailed diagnostic information regarding the issue if the call concerns a system problem (e.g., possible program defect). This diagnostic information includes transaction data, documentation, form/screen names, program names, scenarios leading up to the problem, and error messages encountered.
- ❖ Inform the ApplyIT Helpdesk of any key personnel changes.

## SOFTWARE CHANGE REQUESTS

When the resolution of a call requires any change to be made to the software source code, a Software Change Request is generated. These changes fall into two broad categories:

- a) Bug fixes (software defects)
- b) Enhancements

Software Change Requests are released to customers in three distinct forms:

<b>Hot fix</b>	Binaries and scripts relevant to a bug fix are made available for download as Hot fixes on the ApplyIT web site. Hot fixes are unit tested, but should never be applied to production servers until verified in the client's test environment. Hot fixes may require specialist database knowledge to be successfully implemented.
<b>Service Pack</b>	Periodic consolidation of Hotfixes for a specified Version Release constitutes a Service Pack. Service Packs are subject to full integration testing for compatibility with the underlying version. Service Packs are delivered as self-extracting setup packages for installation.
<b>Version Release</b>	Release of an entirely new version of the software that necessitates a managed upgrade of all components and database objects. Upgrade scripts are incorporated in the release to ensure the successful conversion of data from the previous version.

It is important to also note that a client may “escalate” a Software Change Request by formally requesting that it be considered for immediate release as a Hotfix. One should realise that the pre-release of a specific fix or enhancement generates unscheduled product development and quality assurance efforts and may cause delays in regularly scheduled releases. Based on the severity and complexity of the change, additional charges may be considered if such a one-off pre-release is required. For more information on this subject please contact your ApplyIT account manager.

## Classification of Software Change Requests

<i>Priority</i>	<i>Impact</i>	<i>Availability</i>
<b>Highest</b>	No practical work-around exists or data integrity is at risk and the functionality being used is essential to the business process.	A Hotfix will be made available to sites with "Production Critical" issues.
<b>Urgent</b>	A processing error exists where there is a practical work-around available for completing the transaction. Users are limited their use of the product, but not prevented from using it.	Every reasonable effort will be made to include the fix in the next Service Pack or Version Release
<b>Normal</b>	Low impact or cosmetic change	Possible with Next Version Release
<b>Enhancement</b>	Functionality not currently supported in product	Possible with Next Version Release

Please note that while some changes may be completed rapidly by the development laboratory, they are not available for release until they have undergone the appropriate quality assurance process. In addition, some changes may be dependent upon other items which also need to be completed before the Hotfix may be released.

## REMOTE SOFTWARE SUPPORT

In certain cases, ApplyIT has the ability to connect directly into a customer's computer system to assist in troubleshooting and to provide other optional services. Direct connection requires customer authorization, as well as preparation and appropriate equipment on the part of the user. Standard internet or telephone line/modem capability is used to support this service. Access to user PC's or database servers will provide improved response times for fault diagnostics and resolution.

## Collaboration and Early Adopter Programs

The current feature set of ApplyIT Operations Suite is the result of many years of incorporating customer feedback into the development cycle. The benefits that accrue to ApplyIT of having direct customer input in the specification of new functionality should be readily apparent to users of the software in the multitude of productivity enhancements that have been implemented as a result of these efforts.

Customer collaboration in the further development of the ApplyIT Operations Suite may take many forms and range from the joint specification of customized modules to enrolment in early adopter programs.

Robust software is a direct function of the quality assurance program to which it is subjected. Beyond ApplyIT's internal procedures for software testing, early adopters of the software provide invaluable feedback on system usability. Companies that are enrolled as early adopters benefit in a number of ways:

- ❖ They can materially influence the functionality in a given release to ensure that it meets their specific requirements.
- ❖ They get to make use of new features before they are made generally available
- ❖ Preferential pricing is negotiated for early adopters of new modules

## ON-LINE RESOURCES

ApplyIT maintains an active on-line presence at [www.applyit.com](http://www.applyit.com). Aside from regular news updates, this web site contains useful product information such as:

- ❖ Details of Service Pack and Version Releases
- ❖ Feature updates and product roadmaps
- ❖ Updated on-line user help
- ❖ White Papers and Case Studies
- ❖ Links to additional resources on the web such as relevant legislation and standards bodies

## CONTACT DETAILS

ApplyIT (Pty) Ltd

P O Box 2717

Westway 3635

South Africa

Ground Floor Murray and Roberts Building

Office 101

No 2 The Crescent

Westway Office Park

Westville, Durban

KZN

South Africa

Tel: +27 (0) 31 275 8080

Fax: +27 (0) 31 265 9855

Enquiries: [enquiries@applyit.com](mailto:enquiries@applyit.com)

Support: [support@applyit.com](mailto:support@applyit.com)