

ConnectIT – Support Handbook



Building Solutions For Your Business

Prepared By : Sean Kennelly
ConnectIT
Version : 1.03
Date : 5th February 2018

 ConnectIT
Chase House
City Junction Business Park
Northern Cross
Dublin 17
Ireland
t: (IE) +353 (0)1 485 3444, (UK) +44 (0)208 123 9502
f: +353 (0)1 687 3738
w: www.ConnectITSoftware.com

Contents

Document Control	3
Revision History	3
Glossary Of Terms	4
Welcome To ConnectIT Support	5
The Purpose Of The Support Handbook	5
ConnectIT Customer Support Organisation	5
How To Contact Us	5
ConnectIT Standard Support Processes	6
Severity Classifications and Target Response Times.....	7
Product Maintenance	7
Enhancements	7
Escalation Management	8
ConnectIT Support Responsibilities	8
Non-Support Activities and Customer Responsibilities	9
Securing Optimal support and Safeguarding your Software	10
Non-Compliance	10
Software Licensing	10
Hosted Services.....	10
Availability Of Software Releases	11
Customer Satisfaction Surveys.....	11
Additional ConnectIT Software Services Offerings	11

Document Control

Revision History

Version	Significance Of Change	Prepared By	Date
0.01	Re-Branded From Causeway	Sean Kennelly	25 th Nov 2013
1.00	Sign Off	Dave Kennelly	29 th Nov 2013
1.01	Typos & Grammar Points	Dave Kennelly	15 th Mar 2014
1.02	Enhanced Operating Support	Dave Kennelly	11 th May 2016
1.03	Phone Numbers Update	Dave Kennelly	5 th Feb 2018

Glossary Of Terms

Customer	A Customer is someone who has purchased a ConnectIT solution and / or service.
Customer Funded Development (CFD)	Software development that is usually bespoke and specific to a customer. Technical specifications and delivery are handled by the ConnectIT Professional Services team and the work is funded by the Customer.
Customer Service Team	Members of the wider ConnectIT Support team comprising of Customer Service Representatives who primarily handle incoming requests by telephone and email, administer the Support System and provide initial responses and resolution where possible.
Customer Support Consultant	ConnectIT Software product specialists who provide expertise with their given product set(s) to resolves customer SRs.
DR / Development Request (Defect)	A defined problem within a supported software product where the software doesn't work completely as specified. Several SRs may be linked to a single DR (defect).
DR / Development Request (Enhancement / Roadmap)	A request for enhancing the software in either a specific area or widening its functionality so that it better fits the requirements of the majority of the Customers using that software. Several SRs may be linked to a single DR (Enhancement).
EULA	End User Licence Agreement: A contractual licence that grants a customer the right to use ConnectIT Software in a specific way.
Fix	A fix is a program change or patch that resolves a defect.
High Level Estimate	HLE's are prepared by the PS team in conjunction with the Development group in order to prepare quotes for Customer funded software modifications or bespoke programming.
Knowledge Base	The KB refers to the knowledge base populated by ConnectIT Customer Support, containing published articles that are available for customers to browse via the Customer Web Portal or to be redirected to via responses to Support Requests.
Product	A product is one package of software sold to our customers as a complete system. It can be a compilation of several modules and can exist as several available versions.
Professional Services	ConnectIT's team of business consultants, project managers and technical staff.
Queue	A product-specific or user-specific workspace where SRs are assigned to be worked on until resolution. Queues are also used to reflect the status of DRs as they move through the development life cycle towards release.
Release	A major release of software brings new functionality as well as stabilising features of existing functionality.
Resolution	A resolution can either be a software fix or full release or explanation / set of instructions that provides an answer to the reported problem.
Roadmap	The planned / overall direction for a software product. Development Requests that are assigned the categorisation of 'Roadmap' are considered to be desirable changes to the software, that will increase functionality and enhance the solution.
Severity	Severities are assigned to Support Requests based on the business impact of the reported system issue, in line with the table contained in this handbook. The Target Response times attached to each severity are also detailed here.
Software	ConnectIT Software may be a compilation of several modules and can exist as several available versions and may contain embedded third-party components.
SR / Support Request	A software question or issue from a single customer (internal or external) on a specific area in a single ConnectIT product which is processed. It includes all communication and other processing until its ultimate closure.
Status	The current status of an SR, broadly reflecting whether it is 'with ConnectIT' or 'with customer'.
Support System	ConnectIT's support and helpdesk system comprising of an internal application and externally facing customer web portal.
Target Response Time	Target Response Time
Version	A Software product's version number refers to its build number / code-base and / or data-set

Welcome To ConnectIT Support

At ConnectIT, we care about our customers and take pride in our Customer Support. The ConnectIT Customer Support team aims to resolve software issues in a timely fashion, with minimum disruption to your business and processes. We strive for Customer Service Excellence and to achieve best in class Service Level performance by:

- ✓ Responding to your calls within targeted guidelines
- ✓ Providing ongoing communication regarding your problem through to its resolution
- ✓ Taking ownership of your request for support
- ✓ Providing a defined escalation process when management assistance is needed
- ✓ Maintaining our commitment to continuous improvement of our service processes

Our Customer Support team operates a structured and documented methodology for logging, prioritising, progressing and closing enquiries, giving you visibility of progress and peace of mind that your enquiries are getting the attention they rightly deserve.

The Purpose Of The Support Handbook

This document describes the customer support and software maintenance program that ConnectIT offers to its maintained customer base. Its purpose is to provide guidelines and reference information that you may need when you require software support from ConnectIT. Actual terms and conditions are found in the ConnectIT EULA. We've produced this guide with the following objectives in mind.

- ✓ To introduce you to ConnectIT Customer Support; providing information on our support offering, including definitions of programs, policies, and procedures
- ✓ Help you to effectively utilise ConnectIT Customer Support
- ✓ Explain how you can enhance your ConnectIT customer experience with additional services to meet your needs

ConnectIT Customer Support Organisation

Customer Service: You are able to raise a Support Request (SR) via our web portal, by email or by calling the support line. When a request is raised via the web portal, it is automatically routed to the appropriate queue and picked up by the next available Support Consultant. Another option is to call the support line and speak to a Customer Service Representative who will ask you for specific information and a description of the problem or issue you may be experiencing. The request will then be logged and a confirmation email sent shortly thereafter. The request will then be routed to the appropriate queue to be picked up by the next available Support Consultant.

Product Support: Once a Support Request has been routed to a support queue, a Support Consultant will contact you for additional information or clarification, if so required. This may be verbally via telephone, or electronic update available via the ConnectIT Support portal. Where a request cannot be resolved by the Support Consultant, steps required to replicate the problem and supporting information will be entered into the request history, a Development Request (DR) will be raised and the reference added to the existing Support Request. The Development Request will be forwarded to the ConnectIT Maintenance Team and re-queued to reflect its status via the web portal.

Product Maintenance: Where a Development Request has been raised for a software defect, the ConnectIT Development team will further research the issue and provide programming, testing and a software fix as applicable. In some circumstances, if the issue is considered to be business critical, an ad-hoc patch, update or release will be made available to the customer. Development Requests of a lesser priority will be scheduled and released accordingly in product releases of the given software. The Customer Support team will continue to update the customer on the progress of all Support Requests and Development Requests and where possible, provide the user with interim solutions.

How To Contact Us

Requests for support are made via the ConnectIT Support web portal at: <http://support.ConnectIT.com>

The Support web portal provides end-user self-help and best solutions and the ability to log, update and maintain requests in an interactive environment.

Request history is available at any time of the day, whether a request is open or closed and information is available in a real-time environment.

All customers are encouraged to use the web portal and can be granted a username and password by the ConnectIT Customer Support team.

Access can be granted for an entire department or organisation (so that all requests are grouped together on-line under a single identity) or on an individual basis, depending on specific customer requirements.

Location	Voice Number	Hours Of Operation
UK	+44 (0) 208 1239502	08.30 – 17:30
Ireland	+353 (0)1 485 3444	08.30 – 17.30

ConnectIT Standard Support Processes

This section describes the standard support process that flows from the initial contact with ConnectIT Support.

When logging a request, you will be expected to provide basic information as outlined below, in order for the matter to be progressed accordingly.

The request-logging procedure will issue a unique Support Request Number to the customer. This number should be kept to hand, as it will be referred to in all communication relating to that particular issue.

A Software-specific Support Request type is used to log and categorise your requests and assign them to the ConnectIT personnel most able to resolve your problem.

It is therefore, important that the correct support request type is used when logging calls online and that one support request is submitted per issue.

Below you will find a synopsis of the standard information we expect to receive on a Support Request, these allow us to handle your queries effectively:

N.B The web portal will default many of these details in for you. The Software-specific request types found online will also prompt you for any mandatory information (defined by an asterisk against any given field). Please refer to the separate ConnectIT Support Web Portal User Guide'

Contact	Name of the person to whom responses should be directed
Company	Your Company name
Telephone	Your telephone number including prefix code and any extension
e-mail	e-mail address of the support request originator
severity	Critical (P1), High (P2), Medium (P3), Low (P4)
software	The ConnectIT Software you are operating
version	The version No. of the ConnectIT Software
your reference	If you have your own reference for a Support Request, then enter it here.
Memo	The main details of the Support Request, including business impact
Attachments	e.g. Attach screen shots of error messages

Severity Classifications and Target Response Times

All requests for ConnectIT Support will be handled according to the severity level provided by the customer. A request may include any issue a customer reports regarding the documentation, operation or configuration of the Software. Requests may also include instances where the Software is functioning in a manner that is not in accordance with the Software specifications. The classification of the Support Request will be mutually determined, as outlined below. N.B The severity of the request may be re-classified at any time during its lifecycle, with agreement from the customer.

Target Response Time	Severity Level 1 (Critical)	Severity Level 2 (High)	Severity Level 3 (Medium)	Severity Level 4 (Low)
Hours	Up to 1 Hour	Up to 4 Hours	Up to 8 Hours	Up to 40 Hours
Definition	This classification is given to an issue when the Software cannot be used in any useful way.	This classification is given to an issue that significantly degrades the performance of the Software or materially restricts the use of the software.	This classification is given to an issue that causes inconvenience, but which does not materially affect the ability of the Software to perform its designed function.	This classification is given to support requests of an advisory nature. This includes cosmetic or display issues, or a request regarding software usage.

Product Maintenance

The Support Request will be categorised according to the nature of the problem and the route to resolution: Issues associated with the Software whereby unexpected or undesirable results are exhibited, will be classified as Development Requests (DRs) with a status of 'Defect'. They are assigned to the ConnectIT Development System and a DR no. assigned. The Product Support team will advise this reference number to the customer and add it to the Support Request, making it visible via the web portal. Product Support will continue to update the customer as to progress of the DR through to release. All customer enquiries relating to this issue should still be made via the Support department, quoting the Support Request and / or Development Request number(s).

The Product Support team will continue to update the customer on the progress of all Support Requests and Development Requests and where possible, provide the user with interim "workarounds". Once an issue is resolved a final response will be issued providing any necessary information as to the nature of the solution. We ask that if a customer is not happy with the final response received, they contact Support within 5 days of its receipt.

Enhancements

Issues associated with the Software categorised as system enhancements will also be assigned to the ConnectIT Development System. In this instance, a DR no. will be raised with a status of 'Enhancement' and advised to the customer.

Once assigned to the Development Tracking System as an enhancement, the originating Support Request will be closed and all future communication should quote the DR reference number. Enhancement requests are handled with different response procedures than technical incidents.

ConnectIT's product development teams review each request for feasibility and will prepare a high-level estimate if required. Although ConnectIT cannot guarantee that every request will result in an enhancement, we consider the business case for each request very carefully because these requests help us improve our products. Enhancements that are accepted are, in general, released with the creation of a new version of our software.

Escalation Management

To ensure that issues are reported and progressed in a timely manner, customers are able to seek escalation through the ConnectIT Support management structure. This process can occur when no acceptable workaround, temporary fix, or update is available to resolve the issue.

For issues classified as 'Critical' (S1), work will proceed without interruption, during normal business hours until an acceptable workaround, temporary fix, or software update is available.

Typical escalation timings would be:

Escalation Level	Severity 1 (Critical)	Severity 2 (High)	Severity 3 (Medium)	Severity 4 (Low)
Customer Service Co-Ordinator	1 working hours	4 working hours	8 working hours	8 working hours
Customer Support Team Leader / Manager	2 working hours	2 working days	5 working days	10 working days
Customer Support Director	8 working hours	5 working days	10 working days	15 working days

ConnectIT Support Responsibilities

ConnectIT provides support for the software expressly identified in the contract schedules. This may include working with our software partners to assist in resolution of issues where embedded third-party components are present.

ConnectIT will comply with any and all security measures or change control legislation in accordance with the customer's IT policy.

Non-Support Activities and Customer Responsibilities

Whilst ConnectIT strives to provide you with the best help and support we can offer, our Support Consultants will only spend 15 minutes on any request that is considered to be outside the scope of our standard support offering.

This applies to the following areas:

Whilst we can offer minimal advice on the below topics, any requests relating to these can and will be referred to our Professional Services team as a chargeable activity.

The table below outlines what ConnectIT's responsibilities are ('In Scope') and what remains the responsibility of the Customer ('Not in Scope')

In Scope	Out Of Scope
Software Licensing: The supply (and where applicable) installation of software licenses for ConnectIT Software and / or third-party products purchased through ConnectIT.	Application Administration: Creation of users and passwords, granting of permissions and access and control of system options and configuration will not be performed by ConnectIT Support, and must be handled by the Customer, unless the Software is a hosted solution ¹
Application Support: Troubleshooting issues associated with the standard ConnectIT Software whereby unexpected or undesirable results are exhibited	Installation of software: Patching, updating and installing software should be handled by the Customer wherever possible, unless expressly stated in the Contract Schedule ¹
Interfaces: Support will be provided on standard interfaces, written and delivered by ConnectIT	System setup: Extensive questions on system configuration or Support Requests logged that relates to a new implementation, will be collated by ConnectIT Customer Support and forwarded to the ConnectIT Professional Services / Project team(s)
Software Defects: Reproducing ConnectIT software defects and providing alternative solutions or workarounds until a permanent software fix can be provided	Modified objects & in-house customisations: ConnectIT Support only provides analysis of ConnectIT's standard code set and software structure. Software issues connected to changes or modifications not supplied by ConnectIT will not be supported.
Software Enhancements / Feature Requests: Issues associated with the standard ConnectIT Software, categorised as system enhancements, will be routed by the ConnectIT Support team to the ConnectIT Development team for review	Hardware / Operating System: Any request relating to hardware configurations, including the set-up of printers, updating and patching operating systems, tuning or health-checks, or database administration tasks, must be carried-out by the Customer, unless expressly stated in the Contract Schedule. ¹
Software Maintenance: Providing software updates, patches and releases that include software fixes for both minor and major defects	Report Writing / Creation: This remains the responsibility of the Customer. Where specific reporting requirements cannot be met, this may be passed to ConnectIT's Professional Services team as a training or consultancy engagement
Test Environments: ConnectIT will provide support to Customer test environments and actively encourage the use of these in order to fully test and sign-off new software releases and functionality before production upgrades are performed	Training: Formal classroom and on-site training is available through ConnectIT's Professional Services team. ConnectIT Support will not provide training to end-users as outlined in the EULA
Customer Alerts: ConnectIT will notify Customers of any critical or high-impact issues identified within ConnectIT Software through the Customer Support system	System Backups and Recovery: The back-up, storage and retrieval of application data remains the responsibility of the Customer, unless expressly stated in the contract schedule, or if a ConnectIT hosted solution is utilised
Knowledge Base: ConnectIT will continue to grow, maintain and promote the online Software Knowledge Base which is available to all maintained ConnectIT customers. This contains how-to's, FAQs, guides and other useful information pertaining to ConnectIT's software products	

Notes

1. With operating system support, software installations are included. With enhanced operating system support printers and user maintenance is included.

Securing Optimal support and Safeguarding your Software

- **Maintenance of System Backups:** Customers should maintain a current backup of all programs and associated data at all times. This will greatly assist in the recovery and restoration of systems and data in the event of a disaster recovery situation.
- **System Administration:** The proper functioning of any software system requires the careful management and routine maintenance of the infrastructure and environment on which it resides. Customers are strongly recommended to:
 - Perform routine backups and periodically check the quality of said backups and keep anti-virus software up-to-date.
 - Document and adhere to system management procedures and adopt change control processes so that any changes that may materially affect the support, operation and performance of ConnectIT software can be readily captured and communicated to ConnectIT Support, in the event of a support request being raised for assistance.
- **Test Environment:** To mitigate risk, a standalone or non-production test environment is key. A test system allows customers to test resolutions, back-up strategies and isolate any specific areas of concern with the software, without affecting live data. Furthermore, any new software release can be end-to-end tested to ensure compliance with current business practices and procedures.

Storage Management & Performance Optimisation: Both performance and disk space availability tend to degrade over time, in a production environment. It is the customer's responsibility to monitor these trends and ensure that hardware issues do not cause system downtime.

Non-Compliance

ConnectIT reserves the right to make additional charges for services which are required due to:

- Failing to install 'critical' patches, updates or annual upgrades of the ConnectIT Software correctly or non-compliance with ConnectIT's instructions
- Where ConnectIT is required to carry out site visits due to remote access being unavailable
- Failure of equipment, storage media or other Software not covered by the support service, faults in mains electrical supplies or operator error
- Insufficient training
- Reported errors, which prove not to be so
- The result of any attempt by any person, other than ConnectIT, to modify or maintain the Software otherwise than in the case or your trained staff carrying out normal system functions
- New or updated versions of the operating system, that you are unable to apply yourself or have been installed without prior input from ConnectIT with reference to compatibility with our own software
- ConnectIT also reserves the right to charge for modem transfer of data if such is requested by you to expedite the support services

Software Licensing

ConnectIT software (including any third-party component) may contain an annual fuse date, which runs in-line with your renewal schedule. Where this is the case, a Support Request should be logged at least 5 working days in advance of the licence expiration date. This ensures that payment records can be verified as up-to-date and renewals or extensions can be granted within necessary timescales.

Hosted Services

In the case of applications that are centrally hosted and maintained by ConnectIT, the following specific points will apply:

- The "provision of access to the application" will be the responsibility of ConnectIT, other than where the customer may be required to provide log in details to facilitate the access required to undertake support activities.
- The responsibility to protect and secure data, application and system Software associated with the ConnectIT Software will remain with ConnectIT other than where any of these have been installed within customer infrastructure. The customer remains responsible for the protection and backing up of data that has been transferred to them by the ConnectIT Software.
- The installation of patches and upgrades undertaken on a ConnectIT hosted application remains the responsibility of ConnectIT.

Availability Of Software Releases

Production status is achieved when software has successfully passed the QA stage of the development lifecycle and becomes available for purchase or upgrade.

Production releases are the most recent releases of a product and can be patches, 'hot-fixes' or cumulative software builds. Our maintained Customers are notified via a ConnectIT Customer Announcement when a new production release becomes available and the ConnectIT Support Web Portal will also be updated.

To install a new production release, you will be given download instructions or can contact the ConnectIT Support team using any of the aforementioned contact methods.

The software release will include a description of the new release, release notes and release certificate detailing purpose, changes and any technical pre-requisites.

It is ConnectIT's goal to release bi-annual software maintenance packs, across products where required. These will contain non-critical defect fixes.

Customer Satisfaction Surveys

ConnectIT is committed to providing industry-leading support and to ensure we deliver a valued service to our Customers we need your feedback.

ConnectIT is planning to use transactional surveys on each and every Support Request we close and this is consolidated with further monthly survey information.

The results of the surveys are shared with the ConnectIT business leaders to help identify areas of improvement and build upon Customers' successes.

As part of our ongoing Customer success initiatives, we would like to encourage all of our Customers to participate in these survey exercises.

Additional ConnectIT Software Services Offerings

We want to help you unlock the full value of your ConnectIT Software investment. Please make sure that you review our complete set of service offerings, which include Support, Software-as-a-Service and Professional Services, encompassing Training and Business Consultancy. In case of any questions related to our offerings, contact your ConnectIT Client Account Relationship Manager or contact our Head Office on: +44 (0) 208 1239502 You may also visit www.ConnectITsoftware.com

- **Education Services** we strive to contribute to your success by providing training options to help optimise the use of ConnectIT technology. In addition, we have found that Customers who have invested in training their Employees on the products are more effective in describing the symptoms of the problem and working with Product Support towards a resolution. As a result, this often enables Product Support to identify the underlying cause of the problem quicker and can help speed up resolution time. Alternatively, email the training team directly: enquiries@ConnectITsoftware.com
- **Consultancy** our Professional Services team provides best practice experience and product-specific services, exclusively focused on and tailored to your business requirements. For more information please visit our website at <http://www.ConnectITsoftware.com> or email enquiries@ConnectITsoftware.com
- **Software-as-a-Service (SaaS)** provides a pre-deployed infrastructure over a secure Internet connection. You achieve your desired business outcomes more quickly while minimizing risk and reducing IT complexity. Visit our website at www.ConnectITsoftware.com or email enquiries@ConnectITsoftware.com

SR initiated by customer or ConnectIT personnel

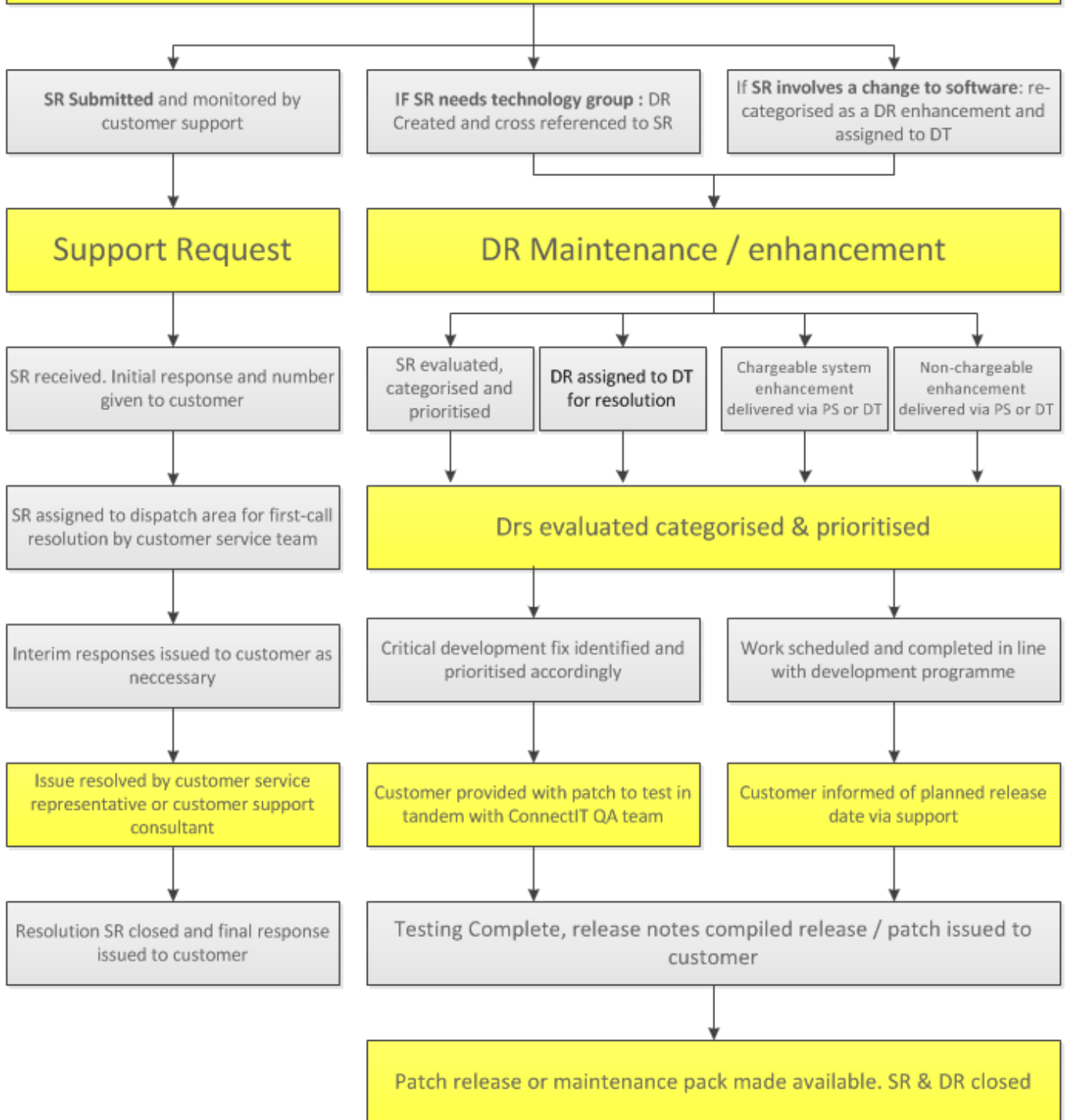


Diagram Legend

SR = Support Request, DR = Development Request, PS = Professional Services, DT = Development Team