Service Level Agreement

Contact Us

W: www.professionaladvantage.co.uk/eservice

T: +44 (0)20 7268 9802

E: support_uk@professionaladvantage.co.uk

professional advantage

Table of Contents

Overview

Welcome to the Professional Advantage UK Helpdesk. At Professional Advantage ("PA"), we know your success depends on how effectively you can put your finance solution to work, and we know the importance of being there when you need us. Our Customer Support Team is here to help you.

Please read through this document carefully as it contains all the information you need to know about our Client Helpdesk. Also note that this document is subject to change, and the latest version of the document may be requested from our Helpdesk, or it can be downloaded from our website.

This document covers all Professional Advantage enhancement solutions excluding XMPro which is covered in a separate SLA.

This document is designed to reflect our current structure and work methods, and is a means of communicating to our clients and partners on how we operate. The terms contained in this document are not a binding legal commitment. It is our commitment to giving a high level of customer service to all our clients and partners.

To the extent there is any inconsistency between the provisions of this Agreement and the License and Maintenance Agreement, the provisions of the License & Maintenance Agreement prevail.

We welcome your feedback regarding anything in this document, and especially how you feel we are performing.

Helpdesk Service & Procedures

Overview of the Customer Support Team

Our Team is permanently staffed with dedicated service professionals who use the latest technology to log and answer your queries, research solutions and provide accurate advice.

The Customer Support Team is supported internally by Professional Services and Development teams. We also have a direct line of communication with our primary software vendors.

The Customer Support Team exists to provide a support service to you by logging and solving incidents relating to PA Software and PA customised modules/interfaces.

Local and global consulting, training, quality assurance and programming teams support the Helpdesk.

Professional Advantage's Responsibilities

The Customer Support Team provides a support service for all software applications and components, business solutions and infrastructure provided by Professional Advantage, and which is covered by a current License & Maintenance Agreement. To help resolve your issue, we may need to liaise with other software vendors, where applicable and required.

Our primary responsibilities include: -

- Providing guidance and offering tips and techniques regarding existing applications or solutions
- Troubleshooting issues with software applications when you experience unexpected results
- Reproducing product defects and assisting in providing alternative methods to help maintain stability until the defect is corrected
- Notifying you of software maintenance updates from our software vendors

We will: -

- ✓ Take ownership of support cases
- ✓ Agree a priority on your case
- ✓ Keep you informed of progress
- ✓ Escalate issues to PA Managers, other PA Teams and/or vendors as required
- ✓ Keep your customer data confidential
- ✓ Work your case until successfully concluded

Customer Responsibilities

We recommend our customers implement the following best practices within your organisation to optimise a stable working environment: -

Appoint a System Administrator

It is important to appoint a System Administrator to take overall ownership of the system and be the main point of contact and liaison between your organisation and Professional Advantage. You can appoint more than one system administrator to ensure coverage of all systems and applications. It is expected there will be at least one system administrator available at all times.

Change Control Processes

It is important to implement change control processes to help track changes to the base system. This should start during the implementation and must be active for every subsequent change that is made. The change control process must cover the operating system, database, and application environments.

Data Security

Your organisation is solely responsible in ensuring the protection and security of company data including data security and integrity, routine system backups, and disaster recovery.

Test environment

A test environment is key to helping minimise the risk to a production environment. Within the test environment, customers can test solutions, upgrade releases, and isolate specific problems found in the production environment. Your test environment may need to be separately licensed, so please check with your Account Manager.

Ensure your staff are fully trained

It is important that your staff are fully trained on the functionality of the software and business processes being used by your organisation. This will ensure productive and effective interactions with our Customer Support Team. Professional Advantage is happy to provide training and consulting services to assist you in meeting this objective.

Reporting Software Issues

Please document and report all detected errors and malfunctions of your software to help the Customer Support Team to diagnose the problem you are experiencing.

Prior to contacting the Customer Support Team, please ensure you collect the required information and perform some initial investigation as outlined in the section “Before contacting the Customer Support Team”.

Respond promptly

To assist in the timely resolution of your case, please respond promptly, clearly and comprehensively to any requests from your Customer Support Team for additional information.

Keep your Maintenance Contract & Account current

To ensure continued service, it is important that you keep your maintenance agreement and company account current. If your maintenance agreement is not active, you are not entitled to support or software upgrades.

How to Contact Us

eService Portal

http://www.professionaladvantage.co.uk/eService	
	You are able to initiate a support case via our Customer Portal or by calling the Support Hotline. When a new case is entered via the Customer Portal, it automatically updates our support database, and is automatically routed to the relevant product support team for assignment to the next available support consultant. We encourage you to log your support incidents online – a very efficient method that assists in enabling our Customer Support Team to quickly begin analysing your issue and researching the resolution. In addition to logging a new case through online support, you can also access other services and capabilities including: - ✓ Ability to view the status and full history of your support cases ✓ Ability to update existing cases ✓ Search our extensive knowledge database ✓ Review the latest News and Product Information
This is the preferred route to log a call as it provides a holistic view of all calls and their history.	

Telephone

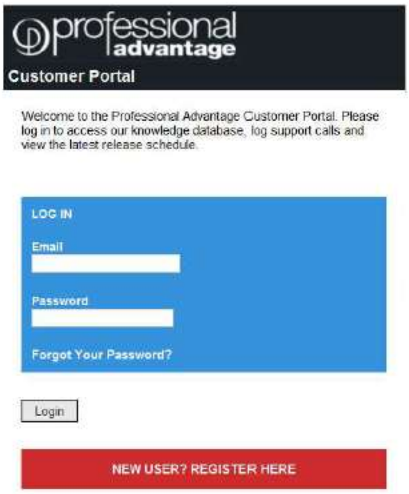
+44 (0) 207 268 9802	
	Local Support:+44 (0) 207 268 9802 If your issue is urgent and you wish to speak directly to a support consultant, please phone the UK Support Hotline. Global Support:+ 61 1300 658 608 Use this telephone number after UK business hours (and during Sydney working hours) if you have an urgent issue and need to speak with a Helpdesk consultant.

Email

Support_uk@professionaladvantage.co.uk	
	Another option is to contact our Customer Support Team via email. A Customer Care team member will review your email and may ask for additional information to enable them to route your query to the most appropriate support queue. Use this email address on any email correspondence to the Helpdesk to ensure prompt response and to avoid unnecessary delay if Consultants are out of the office.

How to register for eService

To register for eService, go to http://www.professsionaladvantage.co.uk/eService Click on the "Register" button and complete all details.



Your User Name and Password will be emailed to you within 2 hours or the next working day.

eService

Logging & Reviewing your Support calls

http://www.professionaladvantage.co.uk/eService

Select eService Requests and enter your registration details. eService is an online client support centre that offers you the following services 24 hours per day, 7 days per week.

- ✓ the ability to log new support calls
- ✓ the ability to review your support calls
- ✓ search our knowledge database
- ✓ submit client satisfaction surveys

The benefit to us of you using eService to log your support calls, is that we can quickly allocate calls to the correct product support specialist, resulting in a more timely resolution to you.

Term	Definition
New Request	To log a new support call, select “New Support Call” and complete all details. Files may also be attached. The “Full Description” should include information detailed later in this document. New Requests are automatically logged in our support database and allocated to the product support specialist by the Team Leader. eService is updated every 15 minutes, so you will be able to see your new service request online approx. 15 minutes after logging
View Service Requests	You can view the status and full history of your service requests online:- ▪ All – enables you to search all your previous support calls by error message, reference or module. Updates to Service Requests are online within 15 minutes
Knowledge Search	You can search our Knowledge database by filtering by product and sub-module or date.
Products	The Products selection will give you access to Product Overviews, Version release details and Reference Manuals
Version Release Details	The Release Schedule gives a detailed list of available versions and compatibility with SunSystems versions.

Support Hours

Normal Support Hours

Our normal Support hours are 9am to 5.30pm (local London time), Monday to Friday, excluding national UK Bank Holidays.

After Normal Support Hours

The Customer Support Team offer a 24 hour contact service. Three options are available to you depending on the urgency of your problem.

Option 1

Log your support case via our Customer Portal. A support consultant from one of our offices will take ownership of your call during normal support hours.

Option 2

Leave a voicemail message with your company & contact details, plus a brief description or your problem and a support consultant will return your call at the earliest opportunity during normal support hours.

Option 3

For urgent issues, you can phone our Sydney Customer Support team on: +61 1300 658 608. Use this telephone number after UK business hours (and during Sydney working hours) if you need to speak with a Helpdesk consultant.

On Call Support

If you need out of hours support you can pre-arrange to have your call diverted to a mobile phone. There is a minimum charge, (double time at weekends), to divert your call to the on-call Support consultant who will determine the appropriate next course of action.

PA Solutions Case Management

The general definition of a support case is any instance of a request for assistance, or a question fully and accurately logged within the PA Support Database, that is related to software operation, to software keys, or to information requests about software offerings. Other commonly used names in this document for a case are incident, issue, call, and log.

All Cases are managed by the Customer Support Team using our internal CRM system. This same system is published to the web as our Customer Portal providing you with a seamless interface to your support cases.

Before contacting the Customer Support Team

Do some initial investigation

Refer to, or liaise with, your internal Systems Administrator or Systems Accountant to:

- Test the problem using your test environment
- Review available reference guides, training guides or online help
- Search the online Knowledge database on our customer portal

Collect information

The speed and efficiency with which support cases can be resolved may be directly affected by the quality of information provided.

Please review the list of important information below and have this information available when you log your incident (whether via the Customer Portal, phone or email). Doing so will help accelerate the process of accurately diagnosing the problem.

- Your company name and software serial number (where appropriate)
- Your contact details (name, email address, and contact number)
- Product name and version number of the applicable installed software
- Details of the incident (e.g. error messages and how to reproduce the error). If you are logging via the Customer Portal, please include screen shots, failed reports, transaction logs, trace files, or other supporting documentation.
- Description of the problem's frequency & predictability (e.g. intermittently, each time function is used, etc.)
- Description of the problem's impact (e.g. does it impact all users, does it occur on all PC's/workstations, does if affect one or all databases)
- You may be asked to confirm your hardware configuration, operating system, database systems, or other integration software
- Details of any recent changes to your system or infrastructure (e.g. recent upgrades, installation of new software, server migration)

Logging the Support Case

Please refer to "How to Contact Us" to correctly log your support issue.

When your support issue is logged with the Customer Support Team, it is assigned to a product specialist (the "case owner"). Clarification of the issue may be necessary before in-depth analysis can be performed and before the product specialist can begin to resolve the incident.

There will always be a case owner assigned to each issue, however, this person may change during the resolution process. As part of managing the case details, the status and commit times of every case will be agreed with you.

In instances where a software defect is identified, the case owner will escalate your issue to the appropriate software vendor. Cases escalated to software vendors are subject to the escalation and response times of that organisation.

Severity Levels & Response Times

When assigning a severity level to your support case, please consider the severity of the problem, the business impact to your organisation, and whether there is a suitable workaround available.

The priority level may change during the life of the support case. Please use the following as a guideline:-

Critical – Priority 1

SYSTEM DOWN. Your production system is inoperable, or a critical application failure has occurred and business processing has halted. There is no workaround. We will respond within 1 working hour to confirm current status and next actions.

High – Priority 2

TIME CRITICAL. A major business process is impaired causing serious impact on daily functions or processing, and there is no workaround.

We will respond within 2 working hours to confirm current status and next actions.

Medium – Priority 3

ROUTINE. A function of the system is not working correctly, and is not time critical. The inability to use the function is not seriously affecting daily business, and there may be a workaround. We will respond within 3 working hours to confirm current status and next actions.

Low – Priority 4

An inquiry and/or low system impact issue that does not need immediate attention. This includes cosmetic issues on screens, a question on the use of a function or configuration of a report, a request for information, or suggestions for enhancing the system and/or application. We will respond within 8 working hours to confirm current status and next actions.

Resolution Times

Case resolution is often an investigative process that is iterative, with many variables, and often requires collaboration and troubleshooting by various teams to determine the root cause in order to bring your case to resolution. As a result, providing target resolution times is difficult. We do commit to providing regular updates as we progress through the troubleshooting process, and we will continue to work the issue until it is resolved.

Interactive or Remote Access

The support consultant may suggest an interactive web based support session, or request remote access to your system, where further clarification of an issue is required, or to facilitate case resolution. Customers will be asked to give permission to our support consultant prior to us making a connection to your system. In the case of remote access, clients are responsible for the protection and security of company data during such access.

Closing a Case

It is important that the support consultant agrees closure of a case with the customer. If more information has been asked of you and we have received no feedback to our requests for a reasonable length of time, the support consultant or Support Manager may close the case log and will notify you accordingly. The case may be reopened by you if you believe the issue is not resolved.

If a software patch has been issued to a customer, we will close the call only after you have confirmed to us that the patch has worked, or 60 days after issuing the patch if no feedback is received - whichever is the later.

Where an issue is resolved in a specific version of software, and that version of software is then released, we will close the call within 60 days after notifying you and your Account Manager of its availability.

What the Helpdesk does

✓	Logs your incident into our Helpdesk database	eService will log your support call automatically into our Helpdesk database. For calls not logged via eService, please ensure all the relevant information requested in in the Collect Information section is available to give to the support consultant. The Support Consultant will log your incident into our Helpdesk database. A unique tracking number is generated for each new incident.
✓	Agrees a priority on your call	We agree a call priority with you. The status of these calls will be reviewed regularly to ensure that correct priority is assigned.
✓	Keeps you informed online	The status and full history of all support calls is available for your review via eService.
✓	Escalates the incident to other departments within Professional Advantage.	In the event the Helpdesk is unable to solve your incident, we escalate the incident to other departments within Professional Advantage.
✓	Sends you weekly “Service Postcards”	A “Service Postcard” is emailed weekly to all clients giving an update on the status of all outstanding Helpdesk calls.
✓	Utilises Interactive Support	Our Helpdesk has the ability to directly view what you’re seeing and/or doing by logging into your system using a standard internet browser. GoToMeeting works with existing firewall technology, password protection and encryption to protect sensitive data.
✓	Identifies your training needs	The number of calls placed with the Helpdesk is monitored on a monthly basis. If it appears that any of your staff require training in specific products or technical areas, we will suggest customised onsite training, to help that person.

Chargeable Helpdesk Activities

Chargeable services offered by the Helpdesk include the activities mentioned below. The Client Services Manager will determine whether these activities can be performed by the Support Consultants, or whether they will need to be referred to the Professional Services Consulting Team.

The Support Consultant will advise you if any activity is deemed to be chargeable, and will seek your approval to proceed in the form of a Terms & Conditions document outlining the activity and expected charge.

Minor Data Repair	The Support Consultant may identify data corruption requiring repair. Where the data corruption is only minor, repair may be performed by the support consultant. Major data corruption will be to the Professional Services Consulting Team where it will be chargeable on a Times and Materials basis and subject to the availability of resources.
Minor Report Writing	The Support Consultant may identify a requirement to amend reports or report definitions. Where the requirement is only minor, report writing may be performed by the support consultant, otherwise it will be referred to the Professional Services Consulting Team where it will be chargeable on a Times and Materials basis and subject to the availability of resources.
Write SQL Scripts	SQL Scripts may be written by Helpdesk Consultants or our Development team and will be approved by the Support Team Leader or Development Manager in advance of quotation. Procedures to minimise risk to your data are outlined in a SQL Approval Form which requires sign off by you, the client, prior to applying SQL scripts.
Onsite Services	The Support Consultant may arrange an on-site visit where it is deemed to be necessary in resolving a Priority 1 incident. On-site visits are chargeable on a Time & Materials basis.

What the Helpdesk doesn't include

In order to dedicate our time to more critical or complex problems, we prefer NOT to take calls which could be investigated and answered without our assistance. We prefer not to…

✖	Read the manual for you	A Reference Manual is provided with all software. Please ensure all problems are investigated in the manual and by searching the online Knowledge database on www.professionaladvantage.co.uk/eService before contacting the Helpdesk.
✖	Offer training over the telephone	We do not offer training over the phone. If training is required, your support consultant will be happy to book you or your staff into public or customised training. The number of calls placed with the Helpdesk is monitored on a monthly basis. If it appears that any of your staff require training in specific products or technical areas, we will suggest available public training to help that person.
✖	Answer incidents that are not related to functionality of the software specified in your Maintenance Agreement	We do not provide support on issues not related to the use or functionality of our own PA solutions. Also, we do not offer advice on accounting procedures, legislation requirements, internal control, or third party software.
✖	Offer installation instruction	We do not give comprehensive installation instructions. If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Professional Services Consultant to assist you.
✖	Offer technical instruction	We do not provide technical services relating to preventative maintenance, hardware administration, backup & disaster recover, database management integrity & connectivity, or user administration. If on-site technical consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Technical Services Consultant to assist you. We do not give configuration or implementation instructions over the phone. If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager or Project Manager who will arrange for a Professional Services Consultant to assist you.

✗	Write your reports	We do not write comprehensive reports or report definitions over the phone. If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Professional Services Consultant to assist you.
✗	Write Business Rules	We do not write Business Rules If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Professional Services Consultant to resolve your problem.
✗	Configure printer settings	We do not configure printer settings. If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Professional Services Consultant to assist you.
✗	Perform data repair	We do not repair data as part of the Helpdesk service unless minor in nature. If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Professional Services Consultant to resolve your problem.
✗	Write SQL scripts	We do not write SQL scripts as part of the Helpdesk service. If on-site consulting is deemed to be appropriate, we will refer you to your Account Manager who will arrange for a Professional Services Consultant to for a quotation to do this.

Serialisations

To request software serialisations please email orders_uk@professionaladvantage.co.uk.

Confidentiality of Client Data

In order to investigate a support case, a customer may be requested to disclose to Professional Advantage certain confidential information regarding their business.

In consideration of such disclosure, Professional Advantage undertakes and agrees to keep the customer's Confidential Information confidential and to maintain that confidentiality on the terms set out below.

"Confidential Information" means all information passing from the client to Professional Advantage including but not limited to databases, trade secrets, confidential business information, customer information, profit and loss statements, management reports, financial data, and related documentation and/or information.

PA agrees to:-

- Store the confidential information of the client in a secure environment
- Take all reasonable steps to prevent or stop any suspected or actual breach of the requirement to maintain the confidentiality of the Confidential Information of the client, and;
- Notify the client immediately it suspects or becomes aware of a breach of the confidentiality of the Confidential Information of the client

PA shall assume responsibility of the actions of its employees, agents and contractors who have access to the Confidential Information of the client and shall ensure that those employees, agents and contractors shall be made aware of and shall be similarly bound by the obligations created under this Agreement in respect of the Confidential Information of the client.

Subject to any further agreement between the parties, and upon resolution of the support case, Professional Advantage shall destroy all of the Confidential Information and all copies of the Confidential Information in whatever form they may be embodied or recorded.

Customer Support Team Engagement

As part of our ongoing management of your account, Professional Advantage will review your overall engagement with the Customer Support Team. The objective of the review is to ensure that you are utilising our services effectively and efficiently.

Part of this review will relate to the volume of cases managed in line with your annual maintenance value. If it is determined that your volume is above the threshold of reasonable use, we will work with you to rectify this imbalance.

Escalation or Feedback

To Escalate a Support Calls or give Feedback on our Service please contact one of the following:

- Leisa Vasil – Customer Support Manager. Leisa.vasil@pa.com.au
- Andrew Parsons – UK Country Manager. Andrew.parsons@professionaladvantage.co.uk
- Nikki Noble – Channel Manager. Nikki.noble@professionaladvantage.co.uk

Other Services

Professional Advantage has a Professional Services team offering on-site application and technical consulting services to clients. These services are charged on a Time and Materials basis and include:-

- installation of application software and/or patches,
- technical health check,
- performance issues,
- troubleshooting, implementation,
- development of program specifications,
- optimisation reviews,
- project management,
- report writing.

Customisations

Professional Advantage is able to offer full services to undertake enhancements, modifications to our software, and full product customisations. These include:-

- functional specification,
- programming,
- software testing and quality assurance
- documentation

Enhancements are generally chargeable to the client on a Time and Materials basis. All quotations and/or Terms of Reference must be approved by the client prior to work commencing.