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INTRODUCTION
The Support Operations Guide describes the interactions between our customers and IFS customer support, services and product development. It provides the basis for each organization to understand their respective roles and responsibilities. This document is not intended to define all business processes in each organization but provides the context in which they will operate and relate to each other.

DIVISION OF RESPONSIBILITIES
The following section outlines what responsibilities lie with the customer and what the customer can expect from IFS.

FIRST LINE
The customer must provide one named Key User to represent themselves and all end-users regardless of the support services they have selected.

An additional Key User’s deputy (contact person) may also be allowed provided they are fully synchronized with each other and have a clear understanding of customer responsibilities.

The customer is expected to provide traditional first-line activities together with end-user support.

For clarification, below is a list of activities which are customer responsibility/customer obligation to perform. This is an example list only and by no means exhaustive:

- All end-user support activities including, but not limited to, training, user account management, security configuration, application configuration and printer management
- All operational activities including, but not limited to, database monitoring, environment cloning, system performance, backup and restoration, disaster recovery, hardware maintenance and code delivery deployment
- Effective use of the Knowledge Search provided via the Customer Engagement Center
- Ensuring that any useful information learned via the Knowledge Search is used either to resolve the case internally or added to the case before it is dispatched to IFS Support
- Ensuring that multiple instances of the same problem are trapped internally within the customer’s organization and are consequently reported to IFS Support only once
- Ensuring that any case dispatched to IFS contains an easy-to-follow description, any salient error messages, is clearly worded, with a precise test plan, and contains all information likely to be needed to commence investigation. The IFS Case Tracking™ tool provides context-sensitive templates to aid this process
- Ensuring that any case dispatched to IFS can be recreated in the customer’s internal test environment
- Ultimately, regardless of options undertaken, one named main contact person (the Key User) always bears full responsibility for all customer actions related to IFS Support and controls the funnel between end-users and IFS Support
Alternately, these services may be provided by purchasing the additional options of 1st Line Support and/or Managed Services.

**SUPPORT SERVICES**

IFS is responsible for providing in the English language the services included in the support package the customer has purchased (as outlined in the Support Services Catalog).

- Support services are provided by a global network of experts, including personnel located at the heart of IFS Product Development in Colombo, Sri Lanka
- IFS is responsible for case ownership from receipt through timely investigation to resolution. Included in IFS’s responsibilities are resolving issues that require a software fix and detailed understanding of the software’s operation; merging fixes and updates required with the customer’s solution and maintaining accurate change and configuration management records. Some of the merging may be done as billable services (e.g. if customization support has not been purchased)

**TEST ENVIRONMENTS**

The following conditions apply to maximize the efficiency of problem resolution.

**Production copy**

The customer is responsible for providing a test environment where issues are reproduced before creating a case with IFS. A test environment is to be copied from production no less frequently than monthly, thus mirroring the data, software and configuration deployed there. If a problem with licensed IFS software cannot be recreated in this test environment, a new copy should be made.

**As-delivered software**

If the customer has any form of deviation from the software that is delivered from IFS, it is essential that an environment containing the as-delivered software be available to assist with isolating the deviations as causal factors when investigating reported faults.

**ENVIRONMENT REMOTE ACCESS**

The customer is responsible for providing IFS Support the ability to connect to the environment(s) by remote access. Passwords and associated information required for remote access are held in a secure and auditable manner by IFS and are restricted to the personnel who have specific need to require them.

- For the collaborative element of remote support, the required method is to use the proprietary TeamViewer™ solution
- For any element of remote support requiring the use of tools to deploy or debug software, the standard method is to establish a VPN LAN to LAN (L2L) tunnel between IFS and the customer site. To achieve this, the customer provides IPSec-compliant endpoint equipment. Over this connection, the IFS SupportNet solution is run. It is also the customer’s responsibility to work with IFS to ensure that only the required level of access is provisioned over
the VPN; this includes both the VPN connection itself and the level of privilege granted to connect to services and applications that are accessed via this connection.

- If the customer chooses to provide an alternative method, including with more time-consuming connection methods, IFS may charge a yearly additional fee to cover the costs associated with administration, ongoing training, internal maintenance or reduced personnel efficiency. Because of such reduced efficiency, it is also likely that the level of service provided will be reduced to some degree from that delivered if the normally required approach has been adopted.

**ACCESSING IFS SUPPORT**

Although IFS provide multiple channels with which to contact us, our Customer Engagement Center (CEC) is the preferred method and all others should be treated as exceptions.

**CONTACT METHODS**

- The IFS Customer Engagement Center is the preferred method of communication for any reported problem. For more detailed information, please see IFS Customer Engagement Center below.

- IFS also provide telephone access during the supported hours. PLATINUM customers have telephone access 24/7 for Severity 1 and 2 cases (as outlined in Support Policy). Wherever a telephone conversation between customer users and IFS personnel is required, it will be documented in the case and hence become visible to the customer via the IFS Customer Engagement Center.

- An e-mail address is provided primarily for follow-up where it is not possible to access the CEC, it being noted that this method of contact may cause delays between receipt of the email and updating of the case.

**IFS CUSTOMER ENGAGEMENT CENTER**

The IFS Customer Engagement Center has a clear objective: To help seamlessly integrate licensed end-users of IFS software with their internal support mechanism and, when required, the wider network of IFS including channel partners. It is therefore the preferred method of communication with IFS Support and carries the benefits outlined below.

The IFS Customer Engagement Center should be used for any aspect at any stage in the lifecycle of implementing, customizing and supporting IFS software at a customer site.

Anonymous access is not available. Display and processing of customer-specific data, outside of IFS personnel, is restricted to registered users of that customer identity.

**Key benefits**

- Elimination of transcribing time and interpretation risk
- Powerful knowledge search
- Solution object for sharing of information
Case document attachments

Key User to work with IFS

Built-in mechanisms to ensure receipt at the correct destination within IFS

Full audit trail

IFS Product Certification information on line

Further information is available in the IFS Customer Engagement Center User Guide.

REQUIRED INFORMATION

The IFS Customer Engagement Center enforces some aspects of required information when sending a case to support (Report Issue to IFS) with mandatory fields and encourages the remaining aspects using a case description template.

Such functionality is one of the reasons why the IFS Customer Engagement Center is the preferred method of case reporting. When the IFS Customer Engagement Center is not used, it becomes necessary to manually provide the following information when reporting a problem:

- Is the production system down for all users? If not, specify which users and the impact to the users
- Give a short description of the issue
- Please specify the business impact and the urgency
- Specify the environment/database where the issue occurs. If this is in production, then also specify a non-production environment where the issue has been recreated (or attempted)
- Specify a detailed test plan with screen names and recreation steps of the issue. Be sure to include screen shots, navigation paths and any prerequisite data setup or any customization details
- Is the issue one-time or random? If random, what is the frequency?
- Do you have a known workaround for the issue? If so, specify details
- When did the issue start to occur? (date and local time)
- Did the problem start to occur after a system change? If yes, specify details of the change

Alternatively, you can also use the CEC to request a service from IFS (Enter Question or Request to IFS). This provides a freeform case description and will be sent to the appropriate team within IFS to be evaluated.

STANDARD OPERATING PRACTICE

SCOPE OF SERVICE

The following section will describe the case-handling process, including receiving, diagnosing and resolving all cases submitted.
While training is not included in the support packages, it is recognized that in many cases it is hard to judge whether a problem relates to a licensed IFS core software error before an element of analysis has been conducted. IFS Support therefore undertakes to initiate analysis of any case received with what appears to be a qualified level of information but will inform the customer’s named main contact person about all activities that are likely to be deemed a service and therefore a chargeable activity as soon as this becomes apparent. This process allows the customer to decide what best represents its interests before additional cost is incurred. Alternately, additional prepackaged Support Services can be purchased. For a list of the additional Support Services that can be purchased, please refer to the Support Services Catalog.

PROCESSING TIME DEFINITIONS

IFS have targeted milestones based on measured processing times. All time starts from the receipt of a registered case. For a list of the milestones that are measured, along with the targets please refer to the Support Policy.

EVALUATE AND CLASSIFY

When IFS receive a registered case during contracted hours, we will begin the Evaluate and Classify process. The start of this process is referred to as reaction time. Our goal is to react to all cases within 15 minutes.

The primary objective of this activity is to enable fast handling of cases, either solving them or classifying them correctly for further handling.

This process includes:

- Initial customer communication (reaction time)
- Identify and filter according to support scope
- Identify current customer situation
- Ensure that we interpreted the issue correctly
- Identify customer expectations through mutual understanding
- Set case severity
- Ensure the customer has fulfilled their obligations
- Providing quick solutions or clarifications
- Case classification (Consulting Service or Support)
- Ensure case is ready for next phase to start investigations (response time)

IFS CASE SEVERITIES

Case severity is a rule-driven indication of a problem’s impact on the customer’s business. According to the IFS Support process, the customer’s own point of view is expressed through case importance. For a list of definitions of case severity please refer to the Support Policy.
RESPONSE TIME TARGETS

For cases dispatched to IFS that are not resolved within the Evaluate and Classify process, response time targets apply for the next level response. These targets can be found in the Support Policy.

CASE IMPORTANCE

Customer expression of severity is freely made by case importance, with one (1) being the highest value and four (4) the lowest. This attribute can be changed by the customer at any time the case is still active and is considered as an additional filter by IFS Support personnel.

REPRODUCIBILITY

For a case to be classified as a new fault in any IFS core software, it must be reproducible by IFS on the most current update of the supported track in use.

CASE CLOSURE

Once the owner considers a case to be resolved, the owner will set the state to “Completed” and contact the customer to request permission to close it. At this point IFS activity has ceased and responsibility for the next step is transferred to the customer.

Agreeing to a closure request

If the customer agrees that the case should be closed, such action can be confirmed through any of the agreed access methods. If the IFS Customer Engagement Center is used, a simple action exists for this specific purpose.

Disagreeing with a closure request

If the customer disagrees that the case should be closed, such intent can be given through any of the agreed access methods. If the IFS Customer Engagement Center is used, the action required of IFS can easily be specified.

IFS CORE SOFTWARE FAULTS

If a case is verified as a new fault in IFS core software, a task will be dispatched to the IFS Product Development team.

All fixes are delivered in the form of an update by default.

The first step in this process is to run an analysis on the customer’s code line. If this runs cleanly, the update will be applied, packaged and delivered to our FTP site for the customer to download.

If Bug Severity 1 or Bug Severity 2 applies according to published Bug Severity Rules, and the customer cannot wait for the next available update, IFS will endeavor to make a fix available separately (see Support Policy for more information).
If extra merging is needed due to non-core software, this service would be provided on a time and material basis (unless customization support has been purchased).

**IFS CUSTOMIZED SOFTWARE FAULTS**

Where the application fault reported proves to be caused by software customized by IFS and customization support has been selected, the current customization specification will be reviewed.

- If no deviation is found, resultant action will follow the steps for an IFS Customization Request
- If a deviation to the functional specification is found, a correction will be provided

If customization support has not been purchased, all activities once diagnosed can be provided as chargeable.

**DATA REPAIR**

IFS is committed to the business success of our customers through their effective use of IFS software. On an individual basis we may therefore try to assist with repair of customer data.

- IFS accept no obligation or responsibility to undertake any data repair that is requested, and if such assistance is given, offers no guarantee as to the result
- Depending on the circumstances involved and any facts that subsequently become apparent, where IFS does agree to assist, the service is chargeable
- Where an environment is hosted by a third party, restrictions may be imposed by the third party that preclude IFS access for data repair. The need for such access should therefore be clarified by the customer with their third-party hosting provider from the outset

**ENHANCEMENT REQUESTS**

Cases that prove to be enhancement requests will fall into one or both of the following two categories.

**IFS Core Software Enhancement Requests**

A case will be deemed to constitute a Core Software Enhancement Request through one of three mechanisms.

- Because the customer openly requested it as such
- After initial analysis by IFS Support personnel
- After extended analysis by IFS Product Development

Each of the above three scenarios will be handled as follows

- The request will be registered as an “Idea” in the IFS Community, the customer Key User informed of this, and the case closed
- At the time of case closure, the customer will also be given the opportunity to proceed with a customization request if they so choose
IFS Customization Requests

A case is deemed to be an IFS Customization Request through one of three mechanisms.

- Because the customer requested it as such
- After analyzing a problem reported against an existing customization and finding that no deviation from the functional specification exists
- After the customer accepts the offer of customization rather than waiting for a potential enhancement to be added to the standard code

For any of these three scenarios resultant handling will be as follows: IFS Consulting services or an appropriate channel partner will work with the customer to agree on the design of a suitable customization for which a charge will usually apply.

THIRD-PARTY PRODUCT SUPPORT

The content of third-party product support varies according to the specific product in question and usually includes conditions imposed by the tool vendor that may change with time. Sometimes support is provided by IFS and sometimes directly by the vendor or their agent.

- In all cases, support applies only to the designed workings of the tool itself, not to user training, assistance with anything under development using the tool or the support of anything already developed with the tool. IFS or the tool vendor may agree to help with such matters, but this will be IFS’s or the tool vendor’s discretion and considered a chargeable consulting service outside the scope of support.

TRAINING

Training is not included in the either of the IFS support packages. For any case that is related to training, the IFS case owner will determine whether they can quickly and easily provide assistance by way of clarification or a suitable, straightforward existing explanation. If no such solution is available, the request for training will be forwarded to your Local Consulting Services team for chargeable assistance. Alternately, you can add additional support services to address these needs, as outlined in the Support Services Catalog.

ESCALATION PROCEDURES

Within the IFS Case Tracking tool are comprehensive monitoring mechanisms to support response time goals based on case severity. If, however, the customer feels for any reason that they are not receiving an acceptable response or wishes to stress a point of relevance, they should contact IFS Support through any of the agreed access methods.

The customer can also escalate a support request at any time either by speaking directly with the case owner or with their Customer Care Advocacy (if they have subscribed to PLATINUM Support services). From there they may request to speak with their local support management. The organization section in the Support Policy provides the list of appropriate contacts to use in the event an issue requires further escalation.
PRODUCT IMPROVEMENTS

IFS regularly make functional and other improvements to the licensed IFS core software. These improvements are delivered to customers in several different ways, namely as fixes, updates or new releases. What each of these means are explained below.

Fixes
Fixes are individual fault corrections related to licensed IFS core software. They will only be made available for bugs that are classified as Severity 1 or Severity 2 (as defined in the Support Policy). It may be possible to provide corrections for Severity 3 or Severity 4 bugs as a single fix, but this will be at IFS’s discretion and, if agreed, will be performed as a chargeable activity. Corrections that are provided in the form of a single fix are only unit tested.

Updates
Updates are a collection of individual fixes and at times functional enhancements made to the licensed IFS core software within a specified time period. On release, an update automatically replaces all previous updates. Unlike single fixes, updates are fully system tested before released.

New releases
As the market demands, IFS also develop new releases of the IFS core software: These including additional functionality and/or technology not available within the release that preceded it. All services required to install and implement a new release are chargeable.
DISCLAIMER

No obligation or precedent of any nature is set or implied by this document, such matters being entirely specified in, and governed by, other legal documents signed and agreed by the parties to which they relate.

About IFS

IFS™ develops and delivers enterprise software for customers around the world who manufacture and distribute goods, maintain assets, and manage service-focused operations. The industry expertise of our people and solutions, together with commitment to our customers, has made us a recognized leader and the most recommended supplier in our sector. Our team of 3,500 employees supports more than 10,000 customers worldwide from a network of local offices and through our growing ecosystem of partners. For more information, visit: IFSworld.com

“Fix” means a standard code software change to correct an error, security vulnerability or other problem. Fixes are compatible with a specific version of the application software as designated by IFS.

End of document