

precisely

# Software Maintenance Handbook

Help your organization realize greater success  
by using our enterprise solutions.



This handbook offers detailed information on the many support options available to you. Please take advantage of this valuable resource on our Precisely Support offerings.

Our Precisely Support options are flexible and designed for organizations of all sizes. Our trained support professionals and subject matter experts provide guidance and troubleshooting. Applying our years of in-depth industry domain expertise, we work with you to learn and understand your specific challenges and needs. Then we help you every step of the way.

Precisely offers our customers a world-class level of technical support. By assisting you in the resolution of technical issues that may arise with our software, we accelerate implementation, help you maintain productivity, and offer an immediate and sustainable return on investment.

Your Software Subscription or Maintenance includes entitlement to patches, bug fixes and new versions of your software as released, extending the value of your investment, and ensuring that you stay up to date with the latest features and functionality.

Our Precisely Support organization is your main point of contact for feedback or questions regarding the functionality, or potential defects of Precisely solutions — referred to as 'Precisely' for simplicity through the rest of this document.

Precisely is fully committed to making you and your organization successful in implementing and using our mission-critical software applications.

# Software Maintenance Handbook

---

Software support services.....	02
Standard support agreement.....	03
Product release support policy.....	04
Technical account management.....	11
Glossary .....	15



## Software support services

Briefly, our Software services consist of:

- Technical support to assist you in the use of Precisely products
- Access to new releases and product updates, issued as available during the current term
- Data updates, if you have licensed data with a subscription
- Correction of technical errors or non-conformities with the use of Precisely products
- 24/7 emergency support: when available and/or contracted for your product

If you wish to learn more about the support and services that we offer, contact your Precisely account executive or get in touch with us via [precisely.com/contact](https://www.precisely.com/contact).

## Service support levels

Standard support can be purchased at the following levels:

- Standard Level 1
- Mission Critical Level 2

Additionally, through Precisely's Technical Account Management Program, a Technical Account Manager can be purchased to provide a superior level of service, with a close partnership on support cases, product updates, projects, enhancements and more.

Service	Standard Level 1	Mission Critical Level 2	Technical Account Management Premium Offering
Access phone and online case management during local business hours <a href="https://support.precisely.com">support.precisely.com</a>	X	X	X
24/7 access to the Precisely online knowledge base: <a href="https://support.precisely.com">support.precisely.com</a>	X	X	X
Enable use of remote access tools (at discretion of Precisely Support team)	X	X	X
Receive free version upgrades and patches	X	X	X
Receive 24/7 critical production emergency support (see page 6 for definition)		X	X
• Excluding shrink-wrap products			
• Available only in English language			
Proactive engagement, single point of escalation, and superior service through Technical Account Management*			X

\*Previously known as ServiceSTAR Program.

## Service level upgrades and downgrades

You may upgrade to a higher service level at any time. Upgrade fees are calculated based on current contract fees and assessed in addition to the current Maintenance or Subscription fee, with incremental charges pro-rated to the next renewal date.

You may also downgrade to a lower service level at the time of renewal without incurring any penalty fees. Mid-term downgrades are not permitted at this time.

## Matching service levels

Upon your purchase of a Precisely Maintenance & Subscription agreement, we support all licenses included in any given license set under the same technical support service level. We do not offer Software Maintenance for a subset of licenses within a license set.

License sets are defined as a single implementation use case within your environment. For example, address validation for batch invoicing by an operations department is a different license set than online/real-time address validation for a web-based marketing campaign.

## Renewal of software maintenance

You can renew your Precisely Maintenance & Subscription agreements if you have a valid perpetual license, or any limited-term software license or subscription prior to its expiration date.

By contracting for a multi year period you may be eligible for savings to the contract price based on the total calculated fee.

### Renewal quote

To assist you with the renewal process, we will issue a renewal quote at least 90 days prior to your expiration date, and email reminders until the expiration date. If you haven't received a quote within 60 days prior to the renewal date, please contact your Precisely renewal account manager.

### Reinstatement policy

If you haven't renewed your Precisely Software Maintenance agreement by the expiration date, support will be systematically terminated. If you wish to obtain coverage for any licenses at a later date, you may reinstate a Precisely Software Maintenance agreement by working with your Precisely renewal account manager. Please note that we will assess a reinstatement fee, calculated as a fee equal to the period of non-coverage plus 10% to continue service.

## Standard support agreement

### Eligibility

Our customers are entitled to support for all Precisely solutions in line with the following guidelines:

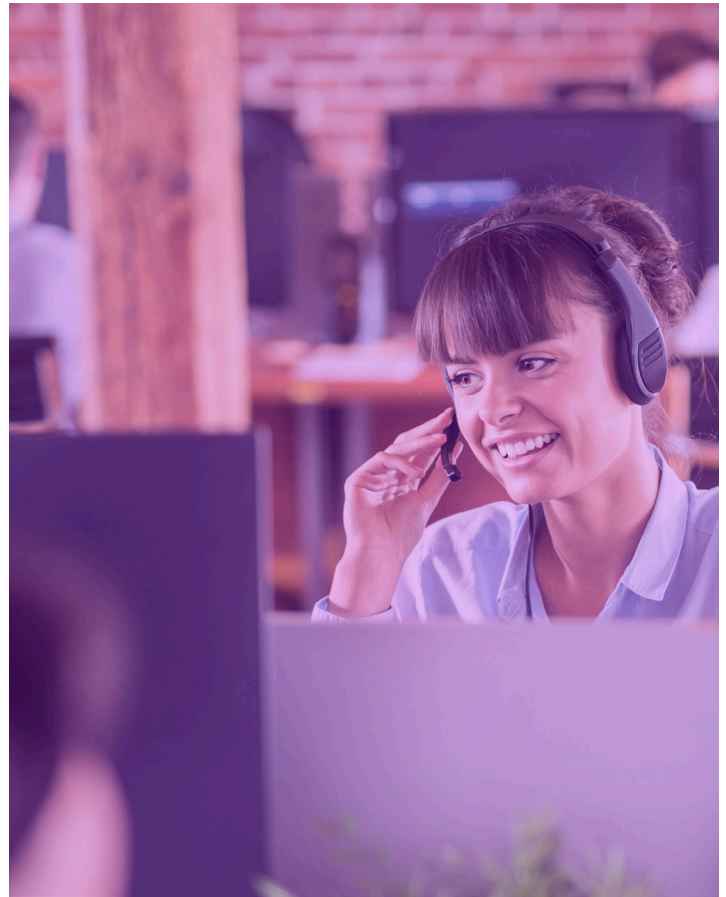
- The Precisely software license agreement and maintenance term are both current and in effect
- Technical support is granted only to the primary licensee of the product

### Scope

Our goal is to assist you with our software products by answering questions and resolving problems specifically related to the operation of Precisely software.

The standard support agreement includes the following benefits:

- Access to the latest product releases and maintenance releases/patches.
- Access to the Precisely website via [support.precisely.com](https://support.precisely.com) for logging and tracking support cases, as well as viewing knowledge base articles.
- Investigation of all reproducible errors in Precisely software applications when operated in supported environments.
- Basic advice on general usage and how-to questions.



Situations occasionally arise which may be outside the scope of Precisely Support services including, but not limited to:

**Professional services:** Precisely Support may recommend engaging our Professional Services team for an additional fee for assistance that extends above the standard scope of support including but not limited to new installs or upgrades, implementation, optimization and in-depth solution analysis, as well as training services.

**Third-party vendors:** In certain situations, a fix from a third-party Vendor may be required in order to resolve the issue. The Support Specialist will assist the Customer/Partner as much as possible when working with a third-party Vendor.

**New features:** Precisely Support staff will provide guidance and troubleshooting of Precisely solutions, however it cannot introduce new product features. If a problem requires functionality beyond the current product design, you must log an enhancement request for consideration in a future release. Please review the resolution section for more information.

## Product release support policy

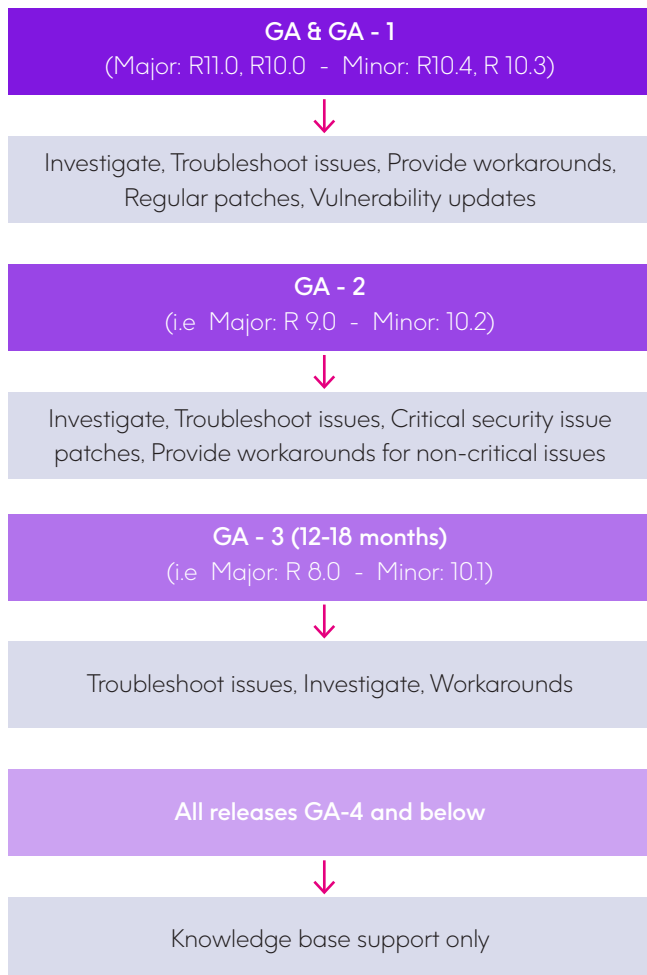
The Product Release Support Policy provides an overview of the length of time during which we offer support for all Precisely products and their associated releases. Support encompasses both general availability and continued support phases. These timelines apply only to major and minor releases, not to patch-only releases.

### General availability (GA)

General availability occurs when a product release becomes available to customers. This phase begins with an announcement describing the general availability of the product and its features.

### Support

Precisely will provide support for Major and Minor Releases as outlined in the diagram below. Full Technical and Engineering Support will be provided for the current and one previous Release. Technical Support will be provided for current and three releases backward.



## Data

The data products policy includes a minimum of one year of support or six months after a major successor release is available, whichever is longer. We recommend that you use the most recent version of all data products to fully access all features and the newest data content. Due to the frequency of updates, we address support issues in the next scheduled release in most cases, rather than as a patch release.

Please review your individual data product policies because specific contractual language related to third-party vendors and data suppliers may override aspects of the data products policy.

### Policy exceptions

Exceptions to our Product Release Support policy are explicit and called out on a release basis. Common exceptions include:

- Frequent releases for less mature products
- Significant lag between releases
- Significant change in third-party technology between releases, discussed in detail in the next section
- Specific terms in your license agreement with Precisely may be different and supersede this Product Release Support policy.

### Third-party vendor-specific support terms

Precisely relies on a variety of products developed by third-party vendors, which may include, but are not limited to, operating systems, database management systems, application servers, web servers and device drivers. While we make every effort to ensure the broadest possible product compatibility is achieved, it's not possible to test every combination. Untested configurations are considered unsupported environments. An issue must be reproducible within a supported environment before investigation can occur.

We list supported environments in product release documentation on the support website. You must remain on a supported environment, including applications and platforms, to receive technical support. If a vendor retires support for its product, you may be required to upgrade to a current supported application, hardware platform, framework, database and/or operating system configuration to continue receiving our technical support services, subject to the terms of your Precisely license agreement.

### Virtual server environment support

Precisely strives to meet our customers' diverse and changing needs. Our software products support and integrate with many of today's leading platforms and operating systems found in enterprise IT environments.

A growing number of our customers run applications and operating systems in virtual server environments. Where our software is licensed for use in a virtual environment, we will support the use of our software in accordance with this policy. Please consult your license agreement for further information on the use of virtual environments.

Precisely does not perform rigorous testing specific to the functionality of virtualized server deployments. We are familiar with virtualized server environments, which are used throughout our software development and support organizations, and we expect our software to function properly in virtual environments that simulate native environments for which the software solutions are certified.

The use of a virtual server environment may add software overhead that can impact performance and / or scalability of software, particularly under peak load. This additional overhead should be accounted for during planning for application performance and capacity. Customers should work with their virtualization solution vendor to make informed decisions regarding hardware sizing and obtain that vendor's advice on how to tune the environment to maximize performance within a virtual machine.

#### **Extended support for a retired product**

In general, Precisely does not offer support for a product that is past its published end-of-life date, in accordance with our Product Release Support policy.



## Service level objective response times

Response targets define response times for new cases reported to Precisely Support. The initial response time is defined as the elapsed period of time between when Precisely Support receives a request for assistance and initiates a response to the customer.

To move the case forward as quickly, efficiently and effectively as possible, the appropriate customer resources must be available to assist and support the troubleshooting effort. In a critical situation, the appropriate resources should be immediately available.

Severity level	Description of issue	Initial response target	Action plan
S1 – Critical	<p>Mission-critical production emergency.</p> <p>System down or Product down, halting or severely impacting business-critical operations. No workaround available at time of the call.</p> <p><b>Note: S1 Critical issues must be reported via phone.</b></p>	<p>Within 30 minutes</p>	<p>Continuously work on critical issues during regional business hours until a solution or workaround is defined.</p> <p>For 24/7 agreements, work around the clock on critical issues.</p> <p>Escalate critical issues immediately to Precisely Support Senior management.</p> <p>A team, which may be comprised of Precisely Support staff and R&amp;D staff (as required), works to identify the source of the problem and, if necessary, creates a workaround or other resolution in order to restore mission-critical operations in the shortest time possible. At that point, the severity level is downgraded.</p>
S2 – High	<p>Severe loss or reduction of service</p> <p>An important function is experiencing a reproducible problem causing serious inconvenience. Business-critical or common operations fail occasionally.</p>	<p>Within 4 business hours</p>	<p>Precisely Support staff will engage with R&amp;D staff as appropriate to identify the source of the problem and, if necessary, create a workaround or other resolution in order to restore normal business operations as soon as possible.</p>
S3 – Medium	<p>Minor loss or reduction of service</p> <p>Secondary function experiencing an intermittent problem. A less common operation fails frequently, causing some inconvenience.</p> <p>Medium-effort workaround available.</p>	<p>Next Business Day</p>	<p>Precisely Support staff will engage with R&amp;D staff as appropriate to identify the source of the problem and, if necessary, create a workaround or other resolution in order to restore normal business operations as soon as possible.</p>
S4 – Low	<p>Minor inconvenience due to loss or disruption of service</p> <p>A less common operation fails occasionally causing low-level inconvenience.</p> <p>Low-effort workaround available</p>	<p>Within 2 Business Days</p>	<p>Precisely will use commercially reasonable efforts to provide an acceptable workaround and incorporate a solution to the problem in the earliest possible timeframe.</p>

## Obtaining support for your Precisely solutions

Precisely is fully committed to making you and your organization successful in implementing and using our mission-critical software applications.

Precisely Support has developed several self-service options to enable you to access the resources and information you need to be successful with your Precisely investments. This includes an online Knowledge Base, product documentation, and online community forums all accessible from our main Support website. We recommend you start here to find the answers you need.

### The support website

The Precisely Support website provides useful resources on your Precisely products.

**Documentation:** Online product documentation is available, organized by version and language. Documentation can include installation guides, user and admin guides, as well as release notes and other product information sheets.

**Knowledge base articles:** Precisely has an extensive Knowledge Base, which includes 'How To' and 'Troubleshooting' articles to help you in your use of our solutions. Our Support team is dedicated to updating existing articles, as well as creating new articles, to ensure you have access to the latest information. For easy access, articles can also be found utilizing your preferred web search engine.

**Online community forum:** The Precisely Online Community Forum is available to enable and inspire product users via collaboration with a global network of experts, both Precisely staff and users like you.

**Additional resources:** From our website, you can also access several other resources including Training, Precisely Ideas Community, the Precisely Data Experience, blogs and more.

Support site:

### Precisely support

For those times when you need more hands-on assistance, you can create a case with our Precisely Support team and our trained professionals will engage to work with you further.

## How to contact Precisely support

To create a new technical support case for your product:

1. Go to [support.precisely.com](https://support.precisely.com) and select Contact.
2. Log into the **Customer** or **Partner** portals and select Create a Case. Need a login to raise a Support case, then please select **Register**.
3. If you have issues logging in, please contact us via phone as described below
4. Call a Precisely Support Engineer at the global contact telephone numbers as listed on [support.precisely.com](https://support.precisely.com).

## Important guidelines for logging a case

You must report any issues that are considered to be critical according to the service level agreement directly to Precisely by telephone. In these cases, do not report by signing in to [support.precisely.com](https://support.precisely.com).

Telephone support is available regionally at the times and contact numbers detailed on [support.precisely.com](https://support.precisely.com).

Depending on the criticality of your case and the Software Maintenance levels you've purchased, Precisely Support will address your case either during regional business hours as listed online, or on a 24/7 basis subject to the terms of your Precisely Maintenance & Subscription agreement.

If you have a problem with your account, invoices, orders, please contact us through the same channels as described above.

Regardless of the method you use to set up a new case, the following specific details are always required:

- Your full contact details including:
  - Account/Account Number (if known), contact name, phone number, email address
- The Precisely software product name and the installed version
- License number, serial number, contract number, if applicable
- System configuration including:
  - Platform, OS version/patches/service packs, database and application server instances/versions/service packs
- Full problem description, including:
  - What are the symptoms?
  - In what context does the problem occur?
  - What was expected to happen Vs the observed behavior?
  - Did the problem occur once or often?
  - Is the problem erratic or consistent?
  - Can the problem be duplicated and, if so, what steps are required to reproduce?
  - What are the exact error message(s)?
  - Screenshots and logs are always very helpful, if available
- Problem severity as defined by the Service level objective response times mentioned on page 6
- The business impact that this issue is causing for your company



## Case progression

### Initial contact

The Precisely Support team works together with you to identify and resolve problems.

Once a new case is initiated for a new issue via web or phone entry, a unique case number is assigned and will be referenced in all future communications to track the issue to closure. When the case is created, an automated system email is sent to the customer contact who initiated the support request, indicating the unique case number. In many cases, we can resolve software issues during the initial call with an explanation of features/ options, a description of known workarounds, or the installation of a recent maintenance/patch release.

For those issues that can't be resolved immediately, Precisely Support staff will, through discussion and analysis, assess the impact of the problem on your overall business. With your input, we'll assign a severity level (1, 2, 3 or 4) to the issue. This severity level will determine our ongoing response as defined in the 'Service Level Objective Response Times' section on page 6. A response time is defined as the elapsed period of time between when a customer makes direct telephone contact with Precisely Support with a request for assistance, and the time for Precisely Support to acknowledge the new case, issue a case identification number and proceed with internal investigations.

For cases logged directly by signing in via [support.precisely.com](https://support.precisely.com), or in response to messages left in voicemail, the response time begins once a case identification number has been provided within your contracted support hours.

We assign each case to an appropriate Precisely Support Engineer once the case is created. If it's not resolved on the initial call, the case proceeds through the following stages:

- Investigation
- Resolution
- Closure

All details supplied by customer contacts are recorded and available via [support.precisely.com](https://support.precisely.com) as part of the case. Some cases require extensive research and incur the unavoidable expenditure of time; we encourage you to check the status online or, when necessary, contact the Precisely Support case owner by telephone.

### Investigation/replication

Attempting to reproduce your issue is the first critically important step. At least one qualified customer staff member, with the appropriate administrator privileges at your site, must be available to clearly articulate the problem and its impact. Success in rapidly troubleshooting a problem and effectively moving the case along depends upon receiving the necessary information from you and your staff.

We may request remote access to your system via third-party technology to best facilitate the investigation and analysis.

We make every attempt to mirror your environment as closely as possible. If, following the investigation, we identify a problem specific to the software product, Precisely will follow the guidelines described in the service level objective response times section to create a resolution. If the problem isn't observed in a supported environment in a Precisely regional support center, we will inform you and evaluate potential next steps, depending on the severity of the issue.

If the issue is related to a product from a third-party vendor (such as an operating system, database management system or application server), Precisely Support will endeavor to collaborate on the investigation related to the third-party, however, appropriate staff must be available to act as a liaison between that vendor and Precisely.

If specialist skills are required, the case will be transferred internally within Precisely as required.

If Precisely Support determines that a reported problem is software-related (for example, a potential bug), we'll engage the assistance of our engineering group for continued investigation and resolution guidance (subject to our 'Product Release Support Policy on page 4.

In the ongoing troubleshooting effort, Precisely Support may request that you provide additional data electronically through one of the following media:

- Uploading directly to your case via the **Customer** or **Partner** portals
- File Transfer: Please contact your regional Precisely Support office for details on how to transfer files to us or alternatively you can provide details of your File Transfer site for us to obtain files from you.

### Virtual server environments

Precisely is committed to helping our customers resolve issues encountered with our software when used in a virtual server environment. To facilitate a quick resolution, and determine the root cause of potential Precisely software issues encountered in a virtual server environment, Precisely provides the following guidelines:

- The customer is responsible for properly configuring and tuning their virtual machine and applications.
- Precisely will not insist that customers recreate each issue without the virtual server (i.e., in their native environment). We reserve the right to request that a customer diagnose and troubleshoot specific issues by eliminating the virtual server environment variable. This will only be done when we have reason to believe the issue is directly related to the virtual server.
- In the event that Precisely support cannot directly identify the root cause as a Precisely software issue, we will ask the customer to open a support issue with the virtual server vendor so that all parties can work together to resolve the problem.

## Resolution

Precisely Support attempts to resolve every case as soon as possible. The assigned Precisely Support Engineer will update you regularly on the status of an open case and will remain accountable for that case until closure.

Upon concluding investigation of the reported issue, a successful resolution can come in several forms as described below:

Term	Definition
Clarity of function	We may simply provide an explanation of a process or function within the software, to help you understand the behavior you should expect. We may refer you to our documentation or provide you with a Knowledge Base article that details the answer to your question.
Suggestion of configuration change	We may suggest you make product or system configuration changes to resolve the issue. Any changes that need to be made to the environment are always discussed first.  If it is determined that the reported issue is a software defect, a code change may be required for complete resolution.
Defect resolution	If available, the Precisely Support Engineer will offer a feasible workaround to provide temporary remediation until a permanent resolution is available.  Depending on the severity and nature of the issue, a permanent fix may be provided as a patch to a currently supported version or included in a future update to the product.
Logging an Enhancement	Please log all Precisely product enhancement requests to our Precisely Ideas Community, including those requests created as a resolution to a technical support case.  Our product management group reviews all posted requests for possible inclusion in future releases of the product. The inclusion of any proposed enhancement is at the discretion of the product management team. You will receive notification via email when a Product Manager comments on or changes the status of your Idea.  Search our knowledge base on how to submit an Enhancement Request in our Precisely Ideas Community. If you already have a login to our support site, you can access the Precisely Ideas Community directly from the site and you can also access our Precisely Ideas Community via <a href="https://support.precisely.com">support.precisely.com</a> .  If you have difficulties posting enhancement requests, contact Precisely Support.
Product upgrade	In some cases, we may ask you to upgrade your product, if:  1. The product level has not been kept current and the solution is available in a newer version of the product ; or  2. The product is running an older release of the product than what is currently supported by Precisely. Please refer to page 4 for our Product Release Support Policy
Third-party fixes	In rare cases, a fix from a third-party vendor may be required to resolve the issue. The Precisely Support Engineer will make reasonable efforts to assist you when working with a third-party Vendor.

### Escalation process

The objective of Precisely Support is to provide effective case management that avoids time-critical situations as much as possible. However, we've implemented a comprehensive case-escalation process for situations that call for extra attention.

We have defined specific rules and criteria against which we can monitor a case's status and/or progress. Every situation is different, but particular circumstances can determine, or common indicators can reveal, when additional management attention is required on any one case.

Our philosophy also mandates that customers have an avenue for communicating a serious concern, especially in situations when production must be halted. This deserves an escalated level of support. You can initiate the escalation process through direct contact with a Precisely Support Engineer.

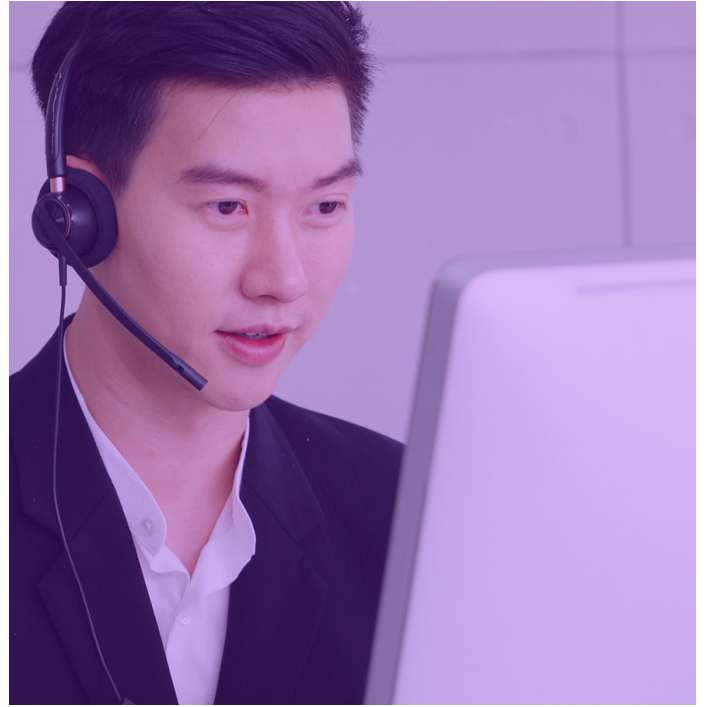
While we have a robust escalation process in place, we always emphasize the resolution of issues as early as possible through the appropriate allocation of resources. Additional resources or escalation are at the discretion of Precisely.

### Closing a support case

Once Precisely has determined that a workaround or permanent resolution has been developed and provided to the customer, we update the case status to resolved. The status of a case is always visible by signing in via [support.precisely.com](https://support.precisely.com).

A Precisely Support Engineer then contacts the initiator of the case to ensure that the resolution is satisfactory. Upon your verification of a successful resolution, the Precisely Support Engineer will ask for permission to close the case. If you grant permission, we will send an email confirmation to your nominated support contact that the case has been closed. You can also request to close your case online by signing in via [support.precisely.com](https://support.precisely.com).

Our standard policy is that cases are only closed with the agreement of you, our customer, or if we do not hear back from you after a reasonable attempt to communicate.



## Technical account management

The **Precisely Technical Account Management Program** offers premium services that provide a long-term, partnership-focused engagement.

Precisely Technical Account Managers (TAMs) are seasoned product specialists with deep domain expertise and senior-level experience in enterprise support, program management, and solutions architecture. TAMs are focused on your success and will help you accelerate time to value and maximize returns on your Precisely investment. They work closely with you to understand your projects, priorities, and constraints, and will ensure the best possible experience with our products, data, and services.

TAMs are your advocates and central points of contact across Precisely support, services, development, and product management for onboarding assistance, case management, planning for future state, escalation ownership, and product enhancement requests.

### Proactive engagement is fundamental to this program.

#### Your Precisely TAMs:

- Send weekly support case reports
- Discuss deployment plans
- Review product fixes or enhancements requested by your organization
- Preview upcoming features
- Track the progress of your projects

Proactive management is instrumental in pre-empting potential problems before they arise and effectively addressing them if they do occur. TAMs partner with the Precisely support team to strategize on your open cases to significantly reduce time to resolution and serve as a single point of contact for all technical matters.

Your participation in the program also builds a closer partnership with Precisely at all levels, including executive engagement and access to internal teams otherwise unavailable to our customers. With a TAM on your team, you gain:

- Access to Precisely product owners
- Regular engagement in strategic roadmap discussions
- Partnership opportunities as we design the new features

Prior customers of ServiceSTAR will continue to receive the benefits described, delivered through an assigned Customer Value Manager and product SME.

### Technical account management highlights:

- **Designated contact:** Precisely TAMs are your main points of contact for any interaction with us – ensuring accountability, ownership, and a swift response.
- **Issue management:** We dedicate time each week to review your open issues, ensuring they're being actioned, and blockers are being addressed.
- **Customer-focused incident management:** While standard support addresses any individual issues, TAMs look at all issues so that we can prioritize and address them in the most optimal way based on your overall environment and specific use cases. TAMs may also make recommendations based on recurring issues or trends, like training, additional documentation, etc.
- **Standing meetings:** Through regular check-ins, we stay aligned with your needs, review cases and project statuses, and resolve priority items.
- **Customer onboarding:** TAMs will manage the technical onboarding process for your team, so you understand our solutions, teams, and portals to ensure you are positioned for ongoing success.
- **Strategic touchpoints:** Regular reviews are recommended to discuss product defect and enhancement prioritization, upgrade plans, and upcoming features.
- **Quarterly/Bi-annual/Annual reviews:** These reviews offer a high-level overview of all activities taking place on your behalf at Precisely. We use this time to discuss product updates, new features, roadmaps, service delivery, and other strategic items.
- **Technical Action Planning:** TAMs on your team will track your goals, success metrics, and business objectives in a collaborative living document. This gives you visibility into our overall progress, blockers, and next steps toward your objectives.
- **Proactive issue notifications:** TAMs are strategically placed to identify issues early and notify you as soon as possible.
- **Prioritization of product requests:** TAMs will work with you to understand the relative priority of your product requests and advocate for your items while working with product management and engineering teams.
- **Escalation management and planning:** We work to prevent any unexpected issues, but in case of problems, TAMs serve as your escalation manager, liaising with internal teams and external team members to develop a clear mitigation plan.
- **Internal advocacy:** TAMs act on your behalf to ensure that all internal parties involved in your success know your goals, understand your business, and take the steps needed to help you achieve your objectives.

**Enhanced technical support:**

- **Priority support:** TAM customers stay at the top of the support priority list. When your issues come in, they go to the top of the queue for issues with the same severity. TAMs will act as a liaison to other technical resources at Precisely, as required and appropriate.
- **Understanding the bigger picture:** TAMs maintain and provide all teams an understanding of your environment and use cases, so your requests and issues have the necessary context for quicker resolutions.
- **Criticality assessment:** Through a close partnership with you, TAMs understand how your software is used and the impact of an outage, to ensure we react appropriately to your business needs.
- **Environment reproduction:** While our support and engineering teams may not be able to guarantee they will always have the exact hardware and resources to reproduce your environment, TAMs work with those teams to get as close to replication as possible, as required and applicable.



**Engagements to meet your needs:**

- **TAM Bandwidth:** Precisely TAM engagements are sized based on your bandwidth needs. All the services listed above are available to our TAM customers, but the frequency of services and amount of time your TAM has available for some tasks will be dictated by your tier of service – outlined below.
- **TAM engagement tiers:**

Standard TAM Engagement	Premier TAM Engagement
<ul style="list-style-type: none"> <li>• Premium support and guidance from domain experts focused on your success with Precisely products and solutions</li> <li>• Proactive engagement with a focus on preventive maintenance and predictive risk management</li> <li>• Bi-weekly or monthly standing meetings</li> <li>• Technical escalation ownership</li> <li>• Support issue tracking and reporting</li> <li>• Bi-annual Technical Action Plans</li> <li>• Annual product roadmap meetings</li> <li>• Expedited support</li> <li>• Not included: TAM onsite travel</li> </ul>	<ul style="list-style-type: none"> <li>• Our most comprehensive engagement tailored to your specific business goals</li> <li>• Expanded access to TAM experts, closer collaboration across more projects, and increased governance for your business-critical solutions</li> <li>• Weekly standing meetings</li> <li>• Technical escalation ownership</li> <li>• Support issue tracking and reporting</li> <li>• Quarterly Technical Action Plans</li> <li>• Bi-annual product roadmap meetings</li> <li>• Expedited support</li> <li>• Access to internal product and leadership teams</li> <li>• Design partnership for developing features</li> <li>• Custom patch notes and testing assistance</li> <li>• TAM onsite travel available</li> </ul>

## Standard support vs. Technical account management

	Benefit	Standard Level 1	Mission Critical Level 2	Technical Account Management Premium Offering
Standard Level 1 and Mission Critical Level 2	Online & phone support	X	X	X
	Access to Precisely online knowledge base	X	X	X
	Access Precisely online customer community	X	X	X
	Software & Data updates	X	X	X
	24/7 mission-critical production emergency support		X	X
Designated contact	Technical Account Manager serves as central point of contact			X
	Customer advocacy through single point of contact			X
Proactive support and white-glove service	Weekly reports on open cases and issues			X
	Weekly tactical touchpoint to discuss cases and issues			X
	Expedited support			X
	Alignment of Precisely resources in applying client business goals to the active handling of support cases			X
	Escalation management			X
	Maintenance of customer profile			X
	Customer project & milestone tracking			X
	Customized notification of relevant new releases, enhancements, patches and updates			X
	Customized testing in Precisely labs, as relevant and required			X
	Access to appropriate internal teams			X
On-boarding	On-boarding to support, service platforms, and company			X
Strategic alignment	Prioritization and review of product fix and enhancement requests			X
	Roadmap review & alignment			X
	Customer success action planning			X

## Standard support vs. Technical account management

	Benefit	Standard Level 1	Mission Critical Level 2	Technical Account Management Premium Offering
Strategic alignment	Monthly strategic touchpoint on upgrade planning and projects			X
	Quarterly/biannual meetings to review service delivery and future planning			X
	Regular reporting summary on standard case metrics and trend analysis			X
	Invitation to Precisely Customer Advisory Board (CAB)			X
	Assessment of the customer's business case and product-use scenarios for value-add opportunities to maximize ROI			X

## Glossary

Term	Definition
Case	<p>A technical support case is defined as a single support issue with a Precisely product. A single support issue is a problem that cannot be broken down into subordinate parts. It involves diagnosing a single error, or a single cause of confusion. Before Precisely responds to a case, the customer and the Precisely Support team must agree exactly on the definition of the problem, the severity of the problem, and the parameters for providing a resolution. It's normal for one case to span multiple telephone calls.</p>
Customer environment	<p>A customer's hardware and network must be adequate and properly configured for the products and applications the customer wishes to run. In certain instances, we may be able to provide tips for improving the performance of Precisely products; however, fine-tuning at the hardware and network level remains the responsibility of the customer.</p>
Enhancement request	<p>An issue reported to Precisely Support is deemed an enhancement request when its resolution would change the product's current functionality. The process for posting any enhancement request is detailed in the resolution section of this document. Our product management group reviews all posted requests for possible inclusion in a future release of the product. The inclusion of any proposed enhancement is at the discretion of the Product Management Team.</p>
Product defect	<p>A product defect, or bug, is an inherent problem in the software and/or product documentation. It is a verifiable defect in the intended functionality or design of the product.</p>
Shrink-wrap products	<p>Shrink-wrap products are desktop products, like MapInfo Pro, when they're not sold as an enterprise solution and are licensed under the standard Precisely end user license.</p>
Supported platforms	<p>Individual product documentation provides detail on supported platforms. Precisely will only support platforms already certified for that product. For further information on approved platforms, please contact your Precisely account executive.</p>
Unsupported environment	<p>Precisely relies on a variety of products developed by third-party vendors, which may include but are not limited to:</p> <ul style="list-style-type: none"><li>• Operating systems</li><li>• Database management systems</li><li>• Application servers</li><li>• Web servers</li><li>• Device drivers</li></ul> <p>While we make every effort to ensure the broadest possible product compatibility, it's not possible to test every combination. Untested configurations are considered unsupported environments. An issue must be reproducible within a supported environment before investigation can occur.</p>
Workaround	<p>A workaround is any solution to a problem that does not involve changing the code of the Precisely software product. Possible workaround solutions include:</p> <ul style="list-style-type: none"><li>• Using an alternate process/approach/method, depending on the problem, to successfully accomplish the task while by-passing the problem</li><li>• Possible software installation changes, including<ul style="list-style-type: none"><li>• Upgrading to a newer version of the product, incorporating the relevant fix</li><li>• Upgrading the operating system, version and/or service pack</li></ul></li></ul> <p>If required, we'll provide patches or new builds, limited to the version of Precisely software products currently shipping. Assisting with installations or upgrades of third-party products is outside the scope of our support.</p>





## About Precisely

As a global leader in data integrity, Precisely ensures that your data is accurate, consistent, and contextual. Our portfolio, including the Precisely Data Integrity Suite, helps integrate your data, improve data quality, govern data usage, geocode and analyze location data, and enrich it with complementary datasets for confident business decisions. Over 12,000 organizations in more than 100 countries, including 93 of the Fortune 100, trust Precisely software, data, and strategy services to power AI, automation, and analytics initiatives.

Learn more at [www.precisely.com](http://www.precisely.com)