

# Description of Support Services

## (“Support Terms”)

These Support Terms are subject to change, for which Planview, Inc. or the affiliate with which the customer has contracted (“Planview”) will provide notice through its Customer Success Center.

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## Introduction

These Support Terms describe the Support Services provided by Planview to Customers entitled to standard Support Services for a Planview Product under their agreement with Planview or who have purchased Premium Support from Planview.

## Support Services

Support Services address issues encountered by Users of Planview Products submitted to Support by a defined application administrator. The following Support Services are provided for each case:

- Case submission using one of the methods described in the “Case Submission Process” section below;
- Scheduled Error Corrections and Improvements; and
- Scheduled updates to the Documentation.

For purposes of these Support Terms, (i) an “**Error Correction**” means a modification to a Planview Product that corrects an “**Error**”, meaning any error or defect in a Planview Product that causes it not to conform in material respects to the Documentation and “Error Correction” means a modification to the Planview Product that corrects an Error and (ii) “**Improvements**” means updates, enhancements, extensions, modifications, and new releases to the Planview Product (other than Error Corrections) that Planview elects to incorporate into and make a part of the Planview Product, and for which Planview does not charge an additional Subscription Services fee.

## Outside of the Scope of Support Services

The following case types are not within the scope of Support Services and are not covered by these Support Terms (including the Response and Resolution targets):

- Functional Support – Questions about how a particular function or feature of a Planview Product works. Functional questions submitted to Support may be directed to Planview’s Professional Services team via the assigned Customer Success Manager or Account Executive. The services provided by Planview’s Professional Services team may be billable.
- Custom Reports and Application Configuration – Support will provide basic application information pertaining to reporting and configuration but will not directly assist in configuring the application or authoring or troubleshooting custom reports. These requests will be directed to Planview’s Professional Services team and may be billable.
- Non-Compatible Configurations and Custom Integrations – Planview Products configured or integrated by Customer with non-compatible endpoints or software. See specific product documentation or compatibility matrix for details.
- Deployment of Upgrades – “**Upgrades**”, defined as significant or material new features, functions, or capabilities of the Planview Product that Planview makes available to its customers for an additional Subscription Services fee, are not made available to Customers as part of Support Services. These will be deployed under a separate Statement of Work. Once deployed, they will be maintained as part of Support Services.

## Customer Responsibilities

Customer will designate support personnel knowledgeable about the Planview Product to report Errors and receive and distribute Error Corrections.

Customer must provide all information and materials requested by Planview for use in replicating, diagnosing, and correcting an Error or other problem with the Planview Product reported by Customer. Customer acknowledges that Planview's ability to provide the Support Services is dependent on Planview having the information and access necessary to replicate the reported problem with the Planview Product.

Failure to meet these responsibilities will invalidate Response and Resolution targets.

## Case Submission Process

Customers must submit Support Services requests (or "case requests") by one of the methods described below.

- **Customer Portal** – Customer case submission is done by logging into the Customer Portal at: <https://support.planview.com>; when logging into the Customer Portal, Users will be prompted to supply their email address and password
- **Premium Plus Support Customers** are provided with an on-call phone number to submit critical severity case requests 24x7x365
- **ProjectPlace** and **AgilePlace** customers must use the product-specific case request submission forms available in the Customer Success Center.
- **Plutora** customers may also submit a case using [support@plutora.com](mailto:support@plutora.com)
- **Sciforma** customers must submit a case at <https://sciforma.zendesk.com>

Please note that Support Services are *only* provided to defined application administrators for Planview Portfolios, AdaptiveWork, Enterprise Architecture, PPM Pro, IdeaPlace, ChangePoint, Daptiv, Barometer, Hub, Viz, Advisor, Plan, Deliver, Vantage, KeyedIn, and shared capabilities such as Planview Copilot. Plutora support is available for all platform users when an application administrator is included in the ticket.

In the event assistance is needed to access the Customer Portal, Customers may use one of the following methods to contact Planview Support:

### Telephone

- United States: +1 (512) 346-8460
- Australia: +61 2 80149318
- New Zealand +64 49 749422
- United Kingdom +44 118-963-7777
- Germany +49 721-95-97-262

**Email** – [customercare@planview.com](mailto:customercare@planview.com)

Neither of these methods of contacting Planview may be used for case submission.

## Case Closure Policy

All cases will be marked as “Case Closed” upon delivery of an Error Correction or Improvement. Cases may also be deemed resolved upon:

- Delivery of answers to general questions;
- Provision of detailed steps/actions for Customer to address the reported issue on its own; or
- Customer’s advising Planview that the case can be marked as Case Closed

Planview will also have the right to close a case if there is no response from Customer for ten (10) business days after delivery of the proposed solution and two (2) follow-up attempts via email. Any closed cases may be re-opened by Customer or by Planview upon request.

## Severity of Support Service Requests

Customer must set a severity for each case request submitted, based on the severity level definitions provided below; this level is subject to review and adjustment by Planview Support Services. Customer may change the severity of any open case by adding a comment to the case and requesting the change or by contacting Planview Support via the Customer Portal. Planview is the ultimate decision maker on severity level of the case.

Severity Assigned	Definition
<b>1 - Critical</b>	<p>System Down: Unavailable production environment or training environment during scheduled training efforts. Critical components are not functional and the ability to work is severely impacted.</p> <p><u>Examples</u></p> <ul style="list-style-type: none"> <li>• <i>All Users are impacted and not able to log into the Planview Product</i></li> <li>• <i>Mission critical modules of the Planview Product are not available to all Users</i></li> <li>• <i>Issues with a previously deployed Improvement or Upgrade are preventing the use of the Planview Product</i></li> </ul>
<b>2 - Major</b>	<p>Major components are not functioning correctly, and business/decision-making is affected</p> <p><u>Examples</u></p> <ul style="list-style-type: none"> <li>• <i>Interface functionality is impaired, leading to essential data not flowing in or out of tools interfaced with the Planview Product</i></li> <li>• <i>Reporting functionality / performance is not working, such as Fast Track reports or Power BI</i></li> <li>• <i>SSO issues are occurring, such that Users cannot log into the Planview Product</i></li> <li>• <i>Issues with timesheet functionality that affect the majority of Users</i></li> <li>• <i>Issues with financial capabilities affecting month-end reporting</i></li> </ul>

Severity Assigned	Definition
<b>3 - Moderate</b>	<p>The issue affects minor or non-critical functionality or data. It has a reasonable workaround.</p> <p><u>Examples</u></p> <ul style="list-style-type: none"> <li>• <i>Reporting functionality is working, but there are anomalies with the report and/or data</i></li> <li>• <i>Any work or changes to sandbox environments</i></li> <li>• <i>Issues with timesheet functionality that affects a single User or a small number of Users</i></li> </ul>
<b>4 - Minor</b>	<p>The issue does not materially impact productivity, efficiency, or affect data. It is merely an inconvenience.</p> <p><u>Examples</u></p> <ul style="list-style-type: none"> <li>• <i>Application spelling errors</i></li> <li>• <i>Wrong color coding</i></li> <li>• <i>Low level defects with an acceptable work around</i></li> </ul>

## Support Service – Response and Resolution Targets

Severity of Request	Target Resolution and Response Time for Reported Cases
Critical	<p><u>Response Time</u>: initial response/acknowledgment from Planview Support within 30 minutes after case request is submitted (“<b>Submission</b>”)</p> <p><u>Restore functionality for SaaS implementations</u>: within 2 hours after submission via a workaround*</p> <p><u>Resolution Time</u>: within 48 hours after Submission**</p> <p><u>Status Updates</u>: every 6 hours after the initial response, until the case is closed or upon availability of new information</p> <p>Note: Updates on mass outages will be provided via the Planview status page (<a href="https://status.planview.com">https://status.planview.com</a>)</p>
Major	<p><u>Response Time</u>: initial response/acknowledgment from Planview Support within 60 minutes after Submission</p> <p><u>Restore functionality for SaaS Implementations</u>: within 2 hours after Submission, via a workaround*</p> <p><u>Resolution Time</u>: either within 96 hours after Submission** via a workaround or with a future release if there is no viable workaround</p> <p><u>Status Updates</u>: upon availability of new information</p>
Moderate	<p><u>Response Time</u>: initial response/acknowledgment from Support within 2 hours after Submission</p> <p><u>Resolution Time</u>: time permitting</p> <p><u>Status Updates</u>: at closure of the case</p>
Minor	<p><u>Response Time</u>: initial response/acknowledgment from Support within 4 hours after Submission</p> <p><u>Resolution Time</u>: time permitting</p> <p><u>Status Updates</u>: at closure of the case</p>

\*The target time to restore functionality for SaaS implementations is the time required to get the Planview Product in a working state via a workaround while a code-level fix is being developed.

\*\*The target resolution time for all cases is dependent upon Customer’s timely response to requests for information. Time that elapses while waiting for requested information will not count toward the target resolution time.

Target resolution and response times do not apply to the following non-Planview defects:

- Customer networking issues (latency, saturation, firewall/proxy issues, etc.);
- Customer client-side issues (browser, OS, connectivity, etc.);
- Support for Customer-created customizations, including custom reports, views, tiles, ribbons, and Hub extensions;
- Questions about how to use the Planview Product, functional questions, training questions, and the like;
- Enhancement requests/customization requests;
- Defects in an OEM software product; and
- Any third-party software or application components not developed and maintained by Planview.

## Root Cause Analysis (RCA) Requests

Planview's internal teams will be tasked with conducting a root cause analysis ("RCA") for cases where an RCA is appropriate. The following issue types will receive an RCA:

- Unexpected outages or changes to environments / data
- Unexpected widespread data Loss
- Mass incidents

An RCA will be worked by the responsible team:

- For incidents classified as "Mass Incidents," the RCA will be made available through the Planview status page - <https://status.planview.com/>
- For cases affecting a single customer and involving unexpected outages or data loss, an RCA will be provided on an individual, case-by-case basis.
- Planview will deliver the RCA within 14 days or 10 business days following the resolution of the issue. The RCA will be presented in the form of a templated document.

## Support Policy

Planview requires Customers to be up to date on Planview Products. Planview only supports the most current version plus the two most recent prior releases of each Planview Product.

### Why Stay Current?

Taking a proactive approach by upgrading to Planview's current release is crucial to Customer success. Staying current enables Customers to take full advantage of new functionality and get the highest levels of security, availability, and performance.

### Supported Releases

Planview's policy is to support the most recent and the previous two versions of all Planview Products. Customers need to plan their upgrade paths to stay on a supported release. The timing and frequency of releases is subject to change at the sole discretion of Planview. Planview provides Error Corrections only for the most recent and the previous two release versions.

## Release Schedule

**Planview Portfolios/Enterprise Architecture/PPM Pro - Monthly Releases** – Portfolios, Enterprise Architecture, and PPM Pro are on a monthly release cycle, and all reported bugs are reproduced in the current code base to be evaluated and confirmed. Prioritized defects will be fixed in the current code and scheduled in a monthly release, as appropriate. Monthly patches are reserved for the most critical issues that cannot wait until the next update. Planview will never backpatch previous releases for standard defects.

- **Portfolios** [https://success.planview.com/Planview\\_Portfolios/Planview\\_Portfolios\\_Product\\_Releases](https://success.planview.com/Planview_Portfolios/Planview_Portfolios_Product_Releases)
- **Enterprise Architecture** [https://success.planview.com/Planview\\_EA/Planview\\_Enterprise\\_Architecture\\_Product\\_Releases](https://success.planview.com/Planview_EA/Planview_Enterprise_Architecture_Product_Releases)
- **PPM Pro** [https://success.planview.com/Planview\\_PPM\\_Pro/Release\\_Information/Newsletters\\_and\\_Announcements/010\\_PPM\\_Pro\\_Release\\_Process](https://success.planview.com/Planview_PPM_Pro/Release_Information/Newsletters_and_Announcements/010_PPM_Pro_Release_Process)

**Viz/ProjectPlace/AgilePlace** follow Continuous Integration (CI) / Continuous Delivery (CD) software engineering best practices. This enables Improvements to occur as changes are promoted (e.g., multiple times per day)

- **Viz** [https://success.planview.com/Planview\\_Viz/Planview\\_Viz\\_Product\\_Releases](https://success.planview.com/Planview_Viz/Planview_Viz_Product_Releases)
- **ProjectPlace** [https://success.planview.com/Planview\\_ProjectPlace/Product\\_updates](https://success.planview.com/Planview_ProjectPlace/Product_updates)
- **AgilePlace** [https://success.planview.com/Planview\\_AgilePlace/Product\\_Releases](https://success.planview.com/Planview_AgilePlace/Product_Releases)

All other products:

- **IdeaPlace** follows a release cadence of every two weeks [https://success.planview.com/Planview\\_IdeaPlace/Technical\\_Information/04\\_Maintenance\\_and\\_Upgrades/12\\_Product\\_Release\\_Cycle\\_Cadence](https://success.planview.com/Planview_IdeaPlace/Technical_Information/04_Maintenance_and_Upgrades/12_Product_Release_Cycle_Cadence)
- **AdaptiveWork** follows a monthly release cadence [https://success.planview.com/Planview\\_AdaptiveWork/Release\\_Notes](https://success.planview.com/Planview_AdaptiveWork/Release_Notes)
- **Changepoint** follows a monthly release cadence [https://success.planview.com/Planview\\_Changepoint](https://success.planview.com/Planview_Changepoint)
- **Hub** On-premises follows a quarterly release cadence with a weekly service release schedule. **Hub** Cloud follows a weekly upgrade and release process [https://success.planview.com/Planview\\_Hub/Planview\\_Hub\\_Product\\_Releases](https://success.planview.com/Planview_Hub/Planview_Hub_Product_Releases)
- **Plutora** follows a Continuous Delivery model <https://help.plutora.com/article-categories/release-notes>
- **Sciforma Plan, Vantage, Deliver, and KeyedIn** follow a monthly release cadence <https://success.sciforma.com>
- **Advisor** follows a Continuous Delivery model, but implementation is on a Customer-request basis only



## Appendix 1 – Support Case Types

Type	Description
Issue/Error	Cases regarding unexpected behavior or action encountered within a Planview Product.
Privacy	<p>Cases regarding the privacy of Customer Data or Planview’s privacy statement should be submitted to <a href="mailto:privacy@planview.com">privacy@planview.com</a>. In accordance with the principle of Privacy by Design and Default. You may – at any time – require us to delete, rectify, restrict, or object to any PII we hold about you. We use a data portal for Data Subjects Access Requests (DSAR portal) where you can exercise your rights as a registered user:</p> <p><a href="https://privacyportal-eu.onetrust.com/webform/2302f5c5-abf7-4394-9997-913f9c3cd976/722e3c00-70f6-425c-b619-f0a700b4ce7f">https://privacyportal-eu.onetrust.com/webform/2302f5c5-abf7-4394-9997-913f9c3cd976/722e3c00-70f6-425c-b619-f0a700b4ce7f</a></p>
Integrations	Cases regarding specific integration issues or questions.
Security	Cases regarding Planview security or application vulnerabilities.
Functional	Cases regarding the use of a Planview Product. Examples include questions related to functionality, usage, and administration, and issues where the Planview Product is not functioning per the Documentation. Functional issues may not always be due to a Defect but could be due to configuration or data issues.
Defect	Error within the Planview Product that prevents it from behaving as intended (e.g., producing an incorrect result) requiring a code-level change to resolve.
Enhancement	Cases to track requests for improvements in a Planview Product or functionality modifications. Examples include requests to add additional functionality or to change the current behavior of a Planview Product.
Performance	Cases to report a server or Customer-side performance issue with a Planview Product.
Cloud Operations	Cases to report an issue or questions about Planview hosted environments (e.g. service restarts or version upgrades).