Customer Care
Description of Support Services

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Customer Care: support.planview.com

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Introduction

This document describes the software maintenance and support services provided by Planview, Inc. and its affiliates and subsidiaries ("Planview") to Customers who either purchase support services from Planview or are a current Planview software-as-a-service ("SaaS Service") Customer ("Customer"). This document includes the following information:

- Standard practices in providing software updates or patches to Planview's software or SaaS Services.
- Process by which Planview receives and responds to Customer-submitted requests for support services.
- Customer Care hours of operation.
- Standard service level targets in providing software support services.
- Software Defect[1] analysis processes.

Support Services

Customer Care services addresses software issues encountered by users of Planview's software and/or SaaS Services applications which are submitted to Customer Care by a defined application administrator or Authorized User. The following support services are provided for each new software update or patch:

- Unlimited calls to Planview Customer Care during business hours.
- Case submission via web, email or phone.
- Case submission via chat is limited to Planview Spigit and Planview Projectplace;
- Scheduled updates to the software.
- Scheduled updates to released documentation.

Services Outside of the Scope of Customer Care

Please note that these cases are not related to or covered by the support service-level targets (as opposed to uptime to Cloud Operations service-level targets) described in this document.

- Functional Support – These are questions about how a particular function or feature of the software or SaaS Service works. Functional questions submitted to Customer Care may be directed to Planview Consulting via the assigned Customer Success Manager or Managing Consultant. The services provided by Planview Consulting may be billable.
- Custom Reports, Configuration & Self-Installs - Customer Care will provide up to one cumulative hour of assistance, per instance, for issues or questions related to custom reports or self-installs. Planview Customer Care will provide information pertaining to configuration but will not configure the application for the customer. Assistance by Customer Care beyond one hour is considered billable and will be referred to Planview Consulting.
- Cases that are routed to Planview Consulting can be accessed via:
  https://support.planview.com

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[1] "Software Defect" is defined on page 12.

Case Submission Process

Customers may submit cases to Customer Care via the methods below. Please note that Customer Care *only* provides support services to defined application administrators for Planview Enterprise One, Planview PPM Pro, Planview Spigit,Planview ChangePoint and Clarizen.
Customers who utilize Planview Projectplace, Planview Leankit, Planview Barometer and Planview Daptiv will utilize product specific case submission forms within the Customer Success Center.

- **Customer Care Community** – Customers may log in to the Customer Care website and submit a case 24/7. The Customer Care Community may be accessed via:
  https://support.planview.com

  When logging into the Customer Care Community, users will be prompted to supply their email address and password.

- **Telephone** – Customers may call Customer Care 24/7. See Communication Matrix (Appendix 1)

- **Email** – Customers may send requests via email. Case requests are received by the Customer Care Dispatcher who will create a case, which is then automatically routed to a Customer Care consultant.

- **Chat** - Chat requests are only available for Planview Projectplace and Planview Spigit. Chats can be initiated during normal business hours via the product UI or at:

  - Planview Projectplace - https://lc.chat/now/8700631/

  - Planview Spigit – via product UI

- **Elite\Platinum\Medallion Support** – 24x7 Coverage – Planview Customers who have elected to purchase an upgrade to **Elite\Platinum\Medallion** Support will be provided an on-call phone number for critical severity cases. The on-call phone number shall be provided to the Customer upon purchase of the **Elite\Platinum\Medallion** Support offering. The customer may make use of this number to contact a Level II Customer Care Consultant during off-hours.

Planview Customer Care provides support for (1) the latest and (2) the most recent previous release. Regarding our multitenant solutions (Planview Leankit, Planview Spigit, Planview Projectplace), the option for previous versioning support is not applicable. Once a software version is no longer covered, Customer Care will escalate requests to Product Management for review and consideration and Customer Care will provide a comprehensive response.

Case Closure Policy

All cases will be marked as "Solution Provided" upon delivery of a resolution or fix. This includes, but is not limited to:

- Answers to general questions.
- Detailed steps/actions to address the reported issue.
- Release of an update or patch that addresses the reported issue.
- Customer advises that the issue can be marked as Solution Provided.

Cases will be moved to a status of "Closed" when the proposed solution is accepted by the Customer via the Customer Care Community or there is no response from a Customer for ten (10)

business days (after two (2) follow-up attempts via email). Any closed cases can be re-opened by the Customer or by Planview upon request.

Severity of Support Service Requests

Customer must set a severity for each case submitted. The severity should be set when creating a case via the Planview Customer Care portal. Customer may change the severity of any open case by adding a comment to the case and requesting the change or by contacting Planview Customer Care via email or phone. Requests to raise the severity to Critical will be reviewed by a Planview Customer Care manager to ensure that the reported issue meets the defined criteria. To make the best use of resources, Planview relies on the severity assigned to each case as a means of determining the order in which to act upon requests. Severity classifications are described in the following tables:

Severity Assigned	Definition
Critical	- Production Service is down or failure of essential features\functions within the application. - Performance degradation depriving the use of essential features\functions within the application. - Functionality leading to data corruption or the loss of data with no work around. - Imminent threat to key business or near-term business milestones posing financial risk.
Major	- Service is operational but impaired use of one or more essential feature\functions within the application. - Service is operational but highly degraded performance to the point of major impact on usage. - Important features within the application are severely restricted with no acceptable or easy workaround; however, operations can continue in a restricted fashion. - Key business decision making impacted
Moderate	- Service is operational with minor feature\functions impacted that does not impact the overall usability of the application. - Key business impacting with workaround, OR non-key business impacting no workaround.

Severity Assigned	Definition
Minor	
	• Non-key business impacting with workaround, OR not business impacting.
	• Information is requested on application capabilities, navigation, installation, or configuration.
	• Defect is affecting a small number of users. Acceptable workaround is available.

Support Service – Response and Resolution Targets for Planview Software Defects

Severity of Request	Target Resolution and Response Time for Reported Cases
Critical	Response Time: Within 30 minutes Restore functionality: 2 hours assuming no code level changes Resolution Time: Within 48 hours* via a Work-around or Update if there is no viable work-around Status Updates: Upon every 6 hours until functionality is restored or upon availability of new information *Mass outages will be provided via the Planview Status page (status.planview.com)
Major	Response Time: Within 60 minutes Restore functionality: 2 hours assuming no code level changes Resolution Time: Within 96 hours* via a Work-around or next Monthly Release if there is no viable work-around Status Updates: Upon availability of new information
Moderate	Response Time: Within 2 hours Resolution Time: Targeted for future update as agreed to by both Parties Status Updates: N/A
Minor	Response Time: Within 4 hours Resolution Time: Time Permitting Status Updates: N/A

*The target resolution time is dependent upon when a customer responds to a request for information. Any time which elapses while waiting for such additional information will not count toward the target resolution time.

Support Service – Response and Resolution Targets for Non-Planview Software Defects

Severity of Request	Target Resolution and Response Time for Reported Cases
Critical	Response Time: Within 30 minutes Restore functionality: 2 hours assuming no code level changes Resolution Time: Within 48 hours Status Updates: Upon every 6 hours until functionality is restored or upon availability of new information Root Cause Report: <= 15 days for System wide issues *Mass outages will be provided via the Planview Status page (status.planview.com)
Major	Response Time: Within 60 minutes Resolution Time: Within 120 hours assuming code level issue is not identified Status Updates: Upon availability of new information
Moderate	Response Time: Within 2 hours Resolution Time: Time Permitting Status Updates: N/A
Minor	Response Time: Within 4 hours Resolution Time: Time Permitting Status Updates: N/A

Planview does not provide service level targets for the following defects:
- Customer networking issues (latency, saturation, firewall/proxy issues, etc.).
- Customer client-side issues (browser, OS, connectivity, etc.).
- Support for customer-created customizations/custom reports/custom views/custom tiles/custom ribbons.
- Questions about "how" to use the software, functional questions, training questions.
- Enhancement requests/customization requests.
- Software defects in an OEM software product, and
- Any third-party software or application components not developed and maintained by Planview.

Software Updates or Patches

Customers who purchase Planview Annual Maintenance and Support or are a SaaS-licensed Customer receive new Planview software updates or patches to the software products which they license.

- **Planview Enterprise One/PPM Pro - Monthly Releases -** Planview Enterprise One and PPM Pro follow a monthly release cadence. Release process for each product line can be found below:
  - **Planview Enterprise One**
    https://success.planview.com/Planview_Enterprise_One/One/Product_Releases/Planview_Enterprise_One_Update_Process
  - **Planview PPM Pro**
    https://success.planview.com/Planview_PPM_Pro/Release_Information/Newsletters_and_Announcements/010_PPM_Pro_Release_Process
- **Planview Projectplace** - Projectplace follows Continuous Integration (CI) / Continuous Delivery (CD) software engineering best practices. This enables updates to Projectplace's services to occur as changes are promoted (e.g. multiple times per day).
  - https://success.planview.com/Projectplace/Product_updates
- **Planview LeanKit** - LeanKit follows Continuous Integration (CI) / Continuous Delivery (CD) software engineering best practices. This enables updates to LeanKit's services to occur as changes are promoted (e.g. multiple times per day).
  - https://success.planview.com/Planview_LeanKit/Product_Releases
- **Planview Spigit** – Spigit follows a release cycle of every two weeks.
  - https://success.planview.com/Planview_Spigit/Technical_Information/03_Maintenance_and_Upgrades/Product_Release_Cycle_Cadence
- **Planview Daptiv** - Daptiv follows a release cycle of every two weeks
  - https://success.planview.com/Planview_Daptiv/Product_News
- **Planview Barometer** - Barometer follows a release cycle of every three weeks
  - https://success.planview.com/Planview_Barometer/2Release_Notes
- **Planview Changepoint** - Changepoint follows a monthly release cadence
  - https://success.planview.com/Planview_Changepoint
- **Planview Clarizen**- Clarizen follows a release cycle of every three weeks
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Appendix 1 – Communication Matrix

Customer Care Support by Product Line and Region		
The Americas/Asia, Pacific (UTC -6:00)		
Planview Enterprise One	Customer Care Community	
	United States	1-512-346-8460
	Australia	61 2 80149318
	New Zealand	64 49 749422
	customercare@planview.com	
Planview PPM Pro	Customer Care Community Case submission form	
	United States	1-512-346-8460
	customercare@planview.com	
Planview Projectplace	Case submission form	
	United States	1-512-346-8460
	Australia	61 2 80149318
	New Zealand	64 49 749422
	support@projectplace.com	
Planview LeanKit	Case submission form	
	United States	1-512-346-8460
	customercare@planview.com	
Planview Spigit	Customer Care Community Case submission form	
	United States	1-512-346-8460
	United Kingdom	44 800 014 8917
	customercare@planview.com	
Planview Clarizen	Clarizen Success case submission form: https://success.clarizen.com/hc/en-us/requests/new	
	support@clarizen.com	

Europe, Middle East, Africa Hours (UTC +1:00)			
Planview Enterprise One	Customer Care Community case submission form		
	Germany	49-721-95-97-262	
	United Kingdom	44-118-963-7777	
	customercare@planview.eu		
Planview PPM Pro	Customer Care Community case submission form		
Planview Projectplace	Case submission form		
	United Kingdom	+44 203 514 59 95	
	Sweden	+46 8 586 302 60	
	Denmark	+45 32 72 70 18	
	Norway	+47 21 40 40 94	
	Germany	+49 721 959 7150	
	Netherlands	+31 20 808 00 63	
	support@projectplace.com & Chat		
Planview LeanKit	Case submission form		
Planview Spigit	Customer Care Community case submission form		
Planview Clarizen	Clarizen Success case submission form: https://success.clarizen.com/hc/en-us/requests/new		
	support@clarizen.com		

Planview Daptiv\Planview Barometer\Planview Changepoint				
Daptiv	Monday - Friday	2:00AM – 7:30PM	Case submission form	
			United States	888.341.9117
			France	+33 (0) 4 89 7373 02
			customercare@planview.com	
Barometer	Monday – Friday	10:00AM – 7:00PM	Case submission form	
			support@barometerit.com	
Changepoint	Monday – Friday	2:00AM – 5:00PM	Customer Care Community case submission form	
			Canada	800-263-7189
			France	+33 (0) 4 8973 7320
			customercare@planview.com	

Appendix 2 – Case Types

Type	Description
Issue\Error	Cases regarding an error encountered within the application.
Privacy	Cases regarding privacy of data or company policy.
Integrations	Cases regarding specific integration issues or questions.
Security	Cases regarding company security or application security.
Functional	Cases regarding the use of Planview software. Examples include questions related to functionality, usage, and administration. Examples include issues where the application is not functioning per the provided documentation. Functional issues may not always be due to a software defect but could be due to application configuration or data issues.
Defect	Cases that clearly identify a defect in the software that can be reproduced. A software defect is an error, flaw, mistake, failure, or fault in the application that prevents it from behaving as intended (e.g., producing an incorrect result).
Enhancement	Cases to track requests for application improvements or functionality modifications. Examples include requests to add additional functionality or to change the current behavior of the software.
Performance	Cases to report a server or client-side performance issue with the Planview software.
Cloud Operations	Cases to report an issue or ask a question for a SaaS implementation. For example: database copies, SSO certificate update, service restart or version upgrade.