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# CUSTOMER SUPPORT PLAN

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GOLD

## 1. Introduction to Gold Support Plan

Colligo is committed to providing the highest level of professional technical support for our products. Recognizing that many enterprises need support beyond the standard level, tailored to their needs, Colligo has created a support plan specifically directed at the business environment. These plans are designed to assist throughout the product lifecycle, starting with the initial deployment, product training and knowledge support for users, through to delivery of upgrades and ongoing enterprise use.

### 1.1. Support Plan Availability

The Support Plan is only available at license purchase time and requires acceptance of a Maintenance and Support Agreement. If you require more in-depth support options, and are willing to commit to assisting the support process, you can add a package of options to enhance the overall user experience. The enhanced Support Plan supersedes and upgrades the standard support offered with each Colligo license.

### 1.2. Support Plan Features

The Support Plan is constructed on a number of features. The availability of a feature depends on which plan you are on. These features include:

#### 1.2.1. Product Version Upgrades (major releases)

An economic way to ensure that the maximum functionality and features are delivered to you. You have access to the latest major version as soon as it is available.

#### 1.2.2. Product Updates and Maintenance (minor releases and service packs)

Electronic delivery of the latest updates, modifications, corrections, and enhancements maintaining the highest levels of product quality.

#### 1.2.3. Online Support Community

A support web site featuring Knowledge Base and Forum topics posted by the Colligo Community, accelerating learning, use case dissemination, and product adoption.

#### 1.2.4. Support Request Submission via Support Portal

Access to the Support team at Colligo and online management of your support requests. Requests are tracked and logged against your account to ensure issues are resolved.

#### 1.2.5. Account Management

A designated contact or technical resource to work with your organization throughout the lifecycle of your account.

#### 1.2.6. Environment Audit and Certification

An audit to qualify and certify your environment to meet the Service Level Agreement.

## 2. Terms and Conditions of Support Services

Colligo will provide reasonable technical Support Services as required to successfully resolve any request for assistance in connection with, but not limited to, the use, operation, or business functionality of the Colligo Product(s) for the period of the Agreement.

Each support request or issue will be assigned a Support Request Reference Number, and Colligo will ensure that it maintains the necessary and adequate processes and resources to properly track and resolve the issue to the point that customer acknowledges that such support issue has been resolved.

Colligo reserves the right to alter or modify the terms and conditions under which it provides technical Support Services, but such changes will not materially affect support provided to existing customers under current support plans.

## 2.1. Support Service Request Process

Customers will, before contacting Colligo for Support Services, attempt to:

1. Troubleshoot based on Colligo training
2. Review Colligo Community and Knowledge Base for possible solutions or known errors:  
<http://www.community.colligo.com/forums>

If the root cause is still not identified and resolvable, then your Colligo Certified Support Contact should proceed with contacting Colligo for Support Services as follows:

1. Refer to the Support Request Checklist in the Community Support site about the required information for successful support request submission and investigation:  
<https://community.colligo.com/entries/26465584-What-information-is-required-by-Colligo-for-Support-Requests->
2. Report issue via the Support Portal by submitting a support request at:  
<http://www.colligo.com/support/request>
3. You will receive a Support Request Reference Number and confirmation by email.
4. The successfully logged support request will be responded to in accordance with the Service Level Agreement for your Support Plan package.
5. If the required information is incomplete, Colligo will ask for the missing information. The support request will not commence its investigation stage ("P2").

## 2.2. Support Service Delivery

Tickets may be logged 24x7 at our Support Community website. However, all support is provided online from our support location in Vancouver, British Columbia, Canada during Pacific Standard Time standard business hours. Additional support outside of standard business hours is not included, unless specifically defined as part of the Support Plan.

### 2.2.1. In-Hours Support

Technical support is available for standard business days: Monday – Friday 0800 – 18:00 Pacific Standard Time (GMT-08:00)

Limited support will be available on non-standard business days, including statutory holidays in British Columbia, Canada.

### 2.2.2. Out of Hours Support

Colligo recognizes that there are occasions when support may be required outside of Colligo's normal support business hours. Colligo may be able offer specific services (subject to current case loads). Advanced planning and agreement is required for this support. Please contact your account representative or client services group for an advanced quotation [sales@colligo.com](mailto:sales@colligo.com)

### 2.2.3. Support Contacts

You will designate your preferred number of your employees as necessary to be a "Colligo Certified Support Contact," provided that those people have undergone training with respect to the Product and

support process to the satisfaction of Colligo. All support requests and communication must be via your Colligo Certified Support Contact

Colligo will provide Support Services only to your Colligo Certified Support Contacts, who will act as the points of reference for Support Services. Colligo reserves the right to direct end users to your Colligo Certified Support Contact(s) to obtain first-line support with regards to their issue or question.

#### 2.2.4. Customer Commitment to Colligo

In order for Colligo to adequately support you, you agree to grant specialized access to your environment, or provide named contacts that can access your environment and provide the necessary information as required by Colligo. The time to access your environment will be deducted from the total time to resolve or fix the issues.

You agree to provide the User Acceptance Test (UAT) response for escalated tickets within one day or Colligo will close the support request as resolved. A new support request will be opened for the closed support request if you determine that the UAT for the closed support request is unacceptable.

Commitment times require your timely response and Colligo may, at their option, deduct customers' response time from the total committed response time due to the following:

- Lack of information required to resolve the problem
- Inability to reproduce the problem using a similar hardware configuration or your server cannot be accessed using the authorization information provided in the technical support request
- Improper use of the Colligo Product
- Incorrect, incomplete, or misleading information
- Failure to follow the established support request procedure

### 2.3. Support Request Topics

Dependent on the Support Plan, Colligo provides you with the ability to submit support requests to the Technical Support team via the online Community Support portal.

#### 2.3.1. Accepted Support Request Topics

Inquiries, issues, and general questions relating to the following product areas are within the scope of the Support Plan:

- Installation of Colligo products
- Product functionality and use (as defined in product documentation)
- Product compatibility (to the extent identified in the product documentation)
- Product integration with SharePoint-dependent software (to the extent identified in the product documentation)
- Issues with Colligo Products as a result of changes to the customer environment that have been Colligo Audited and Certified
- Deployment and Upgrades of Colligo products and services (Dependent on Support Plan Level)

### 2.3.2. Unaccepted Support Request Topics

The following are outside the scope of the Support Plan and will only be provided by Colligo at the chargeable rates, unless otherwise agreed to in writing by Colligo:

- Consulting, custom solutions, or development services
- On-site technical support services, provided by Colligo at your request
- Implementation and deployment
- Product management
- Management or leadership of upgrades or migrations
- Environmental, hardware, or operating errors not caused by Colligo Product
- Implementation of custom, user defined logical operations and algorithms
- Diagnosis of any third-party software code or any of its components
- New feature development
- Modification of code to adapt to a specific business task
- Non-standard configurations or customization of SharePoint deployments
- Questions or issues relating to:
  - Set-up, use or deployment of infrastructure and configuration items within your environment
  - Issues arising as a result of changes to non-Colligo products within your environment
  - Use of other third-party products, except as specifically identified by Colligo as being supported
  - Other services such as Web Services, Service Providers, or Internet Providers
  - Customizations to software identified as supported, except where these customizations have been specifically approved by Colligo
  - Issues with Colligo Products as a result of changes to the customer environment that have not been Colligo Audited and Certified

## 2.4. Customer Environments

Colligo will only provide support services for customer environments that are deemed supported by Colligo and/or that have undergone a Colligo Audit Certification to approve the customer environment for support.

### 2.4.1. Customer Supported Environments

Supported environments are listed on [www.colligo.com](http://www.colligo.com) at the following address:

[http://colligo.com/support/media/document/SilPADZUcYk42jqQYtMw/support\\_matrix.xlsx](http://colligo.com/support/media/document/SilPADZUcYk42jqQYtMw/support_matrix.xlsx)

Colligo will only support the then Supported Services, the then current version of the Product, and the one version immediately preceding the most current Product. You agree that resolution of certain issues may require your upgrading to the most current version of the Product.

### 2.4.2. Customer Environment and Audit Certification

Your environment must be certified by Colligo for the Product. Colligo must be notified by you each time your environment changes. Colligo will conduct an audit and test the environment to re-qualify and re-

certify your environment in order to meet the Service Level Agreement. Please contact your account representative or client services group for advanced quotation [sales@colligo.com](mailto:sales@colligo.com)

Changes to your environment that Colligo should be notified about include, but are not limited to:

- Changes to SharePoint Authentication methods
- Upgrades of SharePoint environment
- Changes to Search Services used
- Addition of features/solutions to environment that impact document libraries or lists being used with Colligo Products
- Upgrades or significant changes to Operating System or Office software being used with Colligo Products

For information relating to Colligo products or services for these areas, please contact your account representative or our sales team at [sales@colligo.com](mailto:sales@colligo.com)

## 2.5. Products

New support plans are available for all products currently identified by Colligo as being in “General Availability” and currently offered for sale.

For the current status of each of Colligo product, please refer to the support web site <http://www.colligo.com/support>

## 3. Gold Support Plan Package

### 3.1. Support Plan Features

	Gold
<b>Support Request Submission Per Year</b>	2 + 1 request per 25 licenses
<b>Online Community Support</b>	Yes
<b>Account Management</b>	None
<b>Minor Release and service packs</b>	Yes
<b>Major Release and Upgrades</b>	Yes
<b>Alert notification for major releases</b>	Website

## 3.2. Service Level Agreements

Issue Severity	Time*	Gold
<b>Urgent (S1)</b>	P1: Response	8 hours
	P2: Investigation	16 hours
	P3: Escalation	Future Release
<b>High (S2)</b>	P1: Response	24 hours
	P2: Investigation	24 hours
	P3: Escalation	Future Release
<b>Medium (S3)</b>	P1: Response	In priority of order
	P2: Investigation	In priority of order
	P3: Escalation	Future Release
<b>Low (S4)</b>	P1: Response	In priority of order
	P2: Investigation	In priority of order
	P3: Escalation	Future release
<b>Informational (S5)</b>	P1: Response	In priority of order

\*All times are within the PST/PDT standard business hours.

### 3.2.1. Time Definitions

#### 3.2.1.1. Response time (“P1”)

The time to receive a support request, confirm the completeness of the information, and confirm the support request has been escalated for resolution.

#### 3.2.1.2. Investigation time (“P2”)

Includes investigation time to understand the issue and scope of the problem, general software operations problems, general questions about configuration, recommended workarounds, and troubleshooting. Investigation time is the time from initial response (“P1”) in which Colligo will use its commercially reasonable best efforts to identify the problem and recommend next steps.

#### 3.2.1.3. Escalation time (“P3”)

Prioritization is based on ranking support level weighting of Support Plan package. Level 1 will receive first priority; Level 2 will receive second priority; Level 3 will receive third priority; Level 4 will receive fourth priority. Those within the same support level will be prioritized based on severity.

### 3.2.2. Severity Definitions

Colligo reserves the right to amend the severity level of a support request from that given by the customer if Colligo believes the severity does not match the definitions as laid out below. Customer Impact and Product Feature Affected are mandatory pieces of information required for successful submission of a support request. If the information you provided is incorrect, it may invalidate the Service Level Agreement for the support request in question.

#### 3.2.2.1. Urgent (“S1”)

Is reproducible and observable by, and impacts, the majority of users AND impacts customer business or use of Colligo product significantly

#### 3.2.2.2. High (“S2”)

Is reproducible and observable by, and impacts, the majority of users AND disables or impairs the use of a major stated feature of the product.

#### 3.2.2.3. Medium (“S3”)

Is reproducible and observable by, and impacts, the majority of users AND disables or impairs the use of a minor feature of the product, OR is observable by, and impacts, the minority of users AND disables or impairs the use of a major feature of the product.

#### 3.2.2.4. Low (“S4”)

Is reproducible and observable by, and impacts, a limited set of users AND disables or impairs the use of a minor feature of the product.

#### 3.2.2.5. Informational (“S5”)

Is a question, clarification, or inquiry relating to a Colligo product.

### 3.3. Support Request Limits

All customers may pay \$150 per hour for additional support that exceeds the maximum support requests in their Support Plan Package. If the issue is determined to be a bug, you will receive a full credit for this additional support charge.

### 3.4. Customer Escalations

Colligo recognizes that there are cases where you may want to have an issue escalated due to particular business circumstances or conditions. In these cases, the specific support request may be escalated via the technical support contact or via your account representative for consideration by Colligo Product Management. However, please note that escalation does not automatically result in an accelerated response and Colligo management reserves the right to limit the amount of time spent on a single issue.

### 3.5. Support Plan Renewal

Support plans are for minimum 12 month terms from the date of purchase. Plans are automatically renewed for a further additional minimum 12 month term, 60 days prior to the anniversary of purchase.

## 4. Training Services

Colligo will provide training and communications of the Support Services process via mutually agreed appropriate means to the Colligo Certified Support Contact(s). Technical training will cover Support Services escalation process, software setup, installation, configuration, functionality, operations, and troubleshooting.

Colligo will charge a daily rate for labor and additional materials as required for training and shall receive reimbursement for all reasonable travel costs.

## 5. Product Management

Colligo has a proactive philosophy toward updating and revising the features, functionality, and capabilities of its products. To support this philosophy, Colligo has developed a product delivery model and lifecycle that uses multiple levels of product release and product states.



## 5.1. Release and Maintenance

Provided that you have paid Support Fees for the then-current Support Services Period, Colligo will provide you all Product Upgrades, Updates, and Maintenance Releases that may be issued and become commercially available to all licenses during the Support Services Period on an identified area of our website.

Dependent on the Support Plan, Colligo will notify Colligo Certified Support Contact(s) in writing or by Email of the existence of a product release, with information about the new features and/or any issues it addresses, and any other pertinent information concerning your installation and use of the product. Email notification will also include the URL location where you can download the product release.

### 5.1.1. Product Upgrades

Product Upgrades, also known as “Major releases,” are available during the term of the Support Plan. Please request product upgrades via our website <https://www.colligo.com/support/upgrade-request>. These product versions are identified by a change in the version digits to the left of the decimal point; e.g. Version 6.0, Version 7.0.

### 5.1.2. Product Updates

Product Updates, also known as “Minor releases,” are made on a product-by-product basis and usually contain minor fixes, Service Pack solutions, and modifications that enhance existing features, functionality, or usability. Product Updates are included free of charge to purchasers of the Support Plan during the term of the plan. These product versions are identified by a change in the version digits to the right of the decimal point; e.g. Version 7.1, Version 7.2.

### 5.1.3. Product Maintenance

To ensure a timely response to customer issues, Colligo may also issue Service Pack releases for a single product or set of products. Service Pack releases usually contain urgent fixes or time critical fixes to address specific issues that could cause disruption to the use or functionality of the product. Service Pack releases are included free of charge to purchasers of the Support Plan during the term of the plan. Service Pack releases are identified by a change in the version digits to the right of the second decimal point; e.g. Version 7.1.11, Version 7.1.12

## 5.2. Product Lifecycle

Colligo uses a product lifecycle model to develop, maintain, and retire its products in a controlled and manageable way. There are five customer engagement states that a release may be in:

### 5.2.1. Beta

A Beta state is a limited deployment of a product that is still undergoing final product acceptance testing. Access to Beta products requires prior agreement and includes a commitment by the customer to deploy, use, and report on specific aspects of the product. Colligo uses this type of product state with early adopters to gain knowledge about operational quality of the product and proposed changes. Beta products are not committed to be made generally available without further refinement and modification.

### 5.2.2. General Availability

A General Availability state is a product in Colligo’s catalogue that is available for purchase without restriction or limitation, other than normal business operations. Customers can expect the functionality is complete as published, operates in accordance to documentation, and is supported via Technical Support.

#### 5.2.3. Limited Availability

Limited Availability is a product that, after a period of General Availability, is restricted to existing customers only. Functionality is frozen and only urgent, critical business affecting issues will be addressed. Access to additional product licenses is via account representatives and customers are expected to be planning for migration to the next release version within this period. Support plans are still in effect.

#### 5.2.4. Sunset

A Sunset product has reached a point where support is for current plan customers only and no plan renewals are accepted. While customers are still able to add additional licenses, they are expected to be actively migrating to a new release version. Only critical issues will be addressed.

#### 5.2.5. Retired

A Retired product has completed its sunset process and Colligo has discontinued support for the product. No further licenses may be sold. Legacy customers are expected to have upgraded to a newer version release. Any support or customer service activity will be on a best-case basis and requires approval from Colligo management. Colligo does not commit to maintain product images, installers, key generators, or documentation current with deployed environment.