

Colleague Standard Support Policy

16 September 2022 11:50

Version History

Version	Status	Date
1.0	Published	20/09/2022

Colleague Standard Support Policy

This policy sets out the standard level of support provided to you, the Customer, by the Colleague Support Team.

User Support is established through telephone conversations and/or email correspondence, with a member of the Colleague Team liaising directly with the originating user(s) or coordinating via a specified point of contact.

All licenced Colleague users are entitled to contact the Support Team.

Information regarding pending updates to Colleague's standard solution are distributed in a fortnightly cycle in the form of:

- Release Notes – distributed via Colleague's website blog, social media and email (subscribed contacts only). Accessible via the Colleague website & Helpfile.
- Product Roadmap – updated per quarter to advise longer term objectives. Accessible via the Colleague website & Helpfile.
- Maintenance Schedule – regularly updated to advise on scheduled updates. Accessible via the Colleague website & Helpfile.

In addition to the standard support policy you are entitled to purchase:

- Consultancy services – Bespoke customisations to the standard solution where possible via the Colleague Support Team
- User and Admin Training – Courses designed to increase User knowledge on Colleague functionality

Definitions and Interpretations

In this policy, the terms listed below shall have the following meanings applied:

- **"Acceptance Criteria"** means pre-established conditions that an Enhancement, Fix or Consultancy request must meet to be accepted by the Customer.
- **"Bug"** means unexpected behaviour, different to a function's intended design.
- **"Business Day"** means a day other than a Saturday, Sunday or public holiday in England.
- **"Colleague Website"** means <http://www.colleaguesoftware.com>
- **"Customer"** means the individual or business that has licensed Colleague.

- **"Designated Decision Maker"** means a user of Colleague or a Stakeholder who has the authority to approve chargeable work to be carried out or who can request increases in licenses.
- **"Enhancement"** means a request to improve or add to the standard functionality of Colleague or a supported Colleague integration. The acceptance of an Enhancement to the Product Backlog is at the discretion of the Colleague Product Owner.
- **"Consultancy"** means ad-hoc bespoke customisation work, which is chargeable, that the Colleague Support Team carry out for the Customer.
- **"Known Issue"** means a Bug with Colleague or supported Colleague integration that has already been identified that is yet to be resolved.
- **"Normal Business Hours"** means 9.00 am to 5.30 pm GMT time on each Business Day.
- **"Primary Point of Contact"** means the designated person who is responsible for prioritising the requirements of the Customer and communicating them to the Colleague Product Owner.
- **"Product Backlog"** means the prioritised list of work that is planned to be worked on by the Colleague Development Team.
- **"Product Backlog Item"** means an individual item of work that make up the Product Backlog. These are typically expressed as a User Story and Acceptance Criteria.
- **"Product Roadmap"** means the long-term plans for work to be carried out by the Colleague Development Team, from three to twelve months into the future.
- **"Online Helpfile"** means standard documentation and video content created by the Colleague Support Team to provide guidance to users on how to use and customise Colleague and supported Colleague integrations.
- **"Colleague Product Owner"** means the person who is responsible for prioritising the Product Backlog, organising the Product Roadmap, communicating these priorities to the Colleague Development Team and distributing updates to customers.
- **"Colleague Development Team"** means the team that carry out Development Enhancements and Bug fixes to the standard Colleague solution and supported Colleague integrations.
- **"Sprint"** means the timeboxed iteration, usually a two-week period, in which the Colleague Development Team carry out planned work (including Enhancements, Bugs, Investigations and Integrations).
- **"Stakeholder"** means users of Colleague whom have an interest in the completion of a Product Backlog Item.
- **"Support Item"** means an individual instance of User Support requested from the Colleague Support Team.
- **"System Administrator"** means a designated user who is typically responsible for system configuration, solution customisation, user creation and configuration as well as being authorised to raise, comment on and accept resolutions to Support Items that have been raised to the Colleague Support Team.
- **"Support"** means a request for assistance, infrastructural issue or other technical issue found in Colleague as part of our standard service.
- **"User Story"** means a short, simple, written description from the point of view of a Colleague user.
- **"User Support"** means a request for assistance with using Colleague or any application provided or licensed through Colleague as part of our standard service.

Requests for User Support

- The Colleague Support Team shall be available to help with User Support requests and assist with existing Support Items, on Business Days during Normal Business Hours.
- Upon receipt of a User Support request, whether by Email or Telephone, a designated Colleague Support Team member will provide the Case ID with reference to the Support Item.
- The Colleague Support Team shall provide links and/or instructions to promote self-service in scenarios where Users can resolve the Support Item themselves.

- The Colleague Support Team shall perform an assessment on the nature of the request to ascertain whether the required solution can or could originate from Colleague. The Colleague Support Team reserve the right to reject a Support Item in the event that the required solution sit outside the scope of Colleague's domain.
- A Colleague Support Team member may on occasion require access to a customer's own environment for investigative purposes. Failure to provide access can result in the closure of the Support Item.
- Recommendations may be made to the User with respect to a Support Item to bring closure an query. The Support Team reserve the right to close the Support Item should the originating User decide to not proceed with these suggestions.
- If the Colleague Support Team spend time on User Support requests that do not relate to our software or services, we are entitled to charge for all associated time costs. The costs for this are described in the Colleague Consultancy Agreement.
- When a User Support request is raised, the Colleague Support Team Member shall access and classify the Priority of the request based on the following definitions:

User Support Request Priority	Description	Response Goal	Resolution Goal
Critical	Business critical processes or functionality cannot be used without assistance	Response to initial request within 1 hour	Aimed to be resolved within one day of the issue being raised.
High	Business critical processes or functionality can be used, but are impeded, without assistance	Response to initial request within 1 hour	Aimed to be resolved within two weeks of the issue being raised.
Standard	Normal working can proceed, but may be impeded, without assistance	Response to initial request within 3 hours	Aimed to be resolved within 1 month of the issue being raised.

- When a User Support request has been deemed as resolved by the Colleague Support Team, the support item will be closed after 5 working days if a subsequent response is not received.
- The Customer shall be provided with unlimited access to the Colleague Helpfile.
- The Colleague Support Team and Colleague Product Owner shall be responsible for maintaining the Colleague Helpfile.
- The Colleague Support Team shall monitor the state of all Live environments, on a day-to-day basis, and act accordingly in a proactive manner should remedial works being necessary on any of the environments.
- Support Items raised regarding the Colleague API, whether direct or via a third party, shall be logged as a Case ID by the licenced customer and treated under the same priority definitions as specified in the User Support Request Priority table.
- It may be appropriate to review the specification of the hosting server being utilised to store your data in the cloud (Microsoft Azure). The Colleague Support Team endeavour to ensure server

specifications are kept to a minimum through the management of data integrity, indexes and optimal coding. However, increased data volume and usage will necessitate reviews and on occasion result in a recommended increase in specification. In the event of a recommended increase, this proceeds based on customer consent. The Support Team reserve the right to close the Support Item should the customer decide to not proceed with these suggestions.

- Should any Support Items be determined as a request for alterations to customisable elements of the standard Colleague solution this will be deemed as Consultancy. Consultancy requests are investigated against a specification and quoted based on the foreseen timescale to deliver the requested change. The associated costs are then quoted by the Colleague Support Team member to the customer.
- Approved Consultancy quotations are then scheduled with the Colleague Support Team.

Raising Enhancement Requests

- The Colleague Support Team will conduct a review of the Support Item to determine whether a requested update meets the criteria of an Enhancement.
- In the event of an Enhancement Request, the Colleague Support Team shall raise a Product Backlog Item, reference the customer as a stakeholder and notify the Product Owner. The necessary information will then be passed to the Colleague Development Team to assess the Enhancement's impact and priority.
- The Product Owner shall determine if Enhancement Requests can be accepted into the Product Backlog or if bespoke Customer specific work is required to be completed, through Consultancy.
- The acceptance of an Enhancement to the Product Backlog is at the discretion of the Product Owner.
- The reference number of an accepted Product Backlog Item shall be provided to the customer for their information. This reference will also be provided to any additional stakeholders whom reiterate the original request.
- The Product Owner shall investigate and determine the required development effort for the Enhancement Request.
- The Colleague Development Team are entitled to reject any request that is raised if:
 - The request is related to a product or integration that is not provided or supported through Colleague as part of our standard service.
 - The request does not contain the required minimum information, of a User Story and Acceptance Criteria describing the Enhancement request.
- The Product Owner shall determine the Priority of Enhancement Requests, in consultation with the Colleague Development Team based on the following Priority definitions:

Enhancement Request Priority	Description
Critical	An enhancement that is required for business-critical functionality and/or processes
High	An enhancement that will improve business critical functionality and/or processes
Medium	An enhancement that will improve non-critical functionality and/or processes
Low	An enhancement that will improve the system, without affecting business critical or non-critical functionality or processes

Please Note: The Product Owner is entitled to reduce the Priority of an Enhancement Request at any point in time.

- The Product Owner shall include information about completed Enhancement Requests in the release notes of each release. The release notes shall describe what has changed within the standard Colleague solution from the perspective of both Enhancements and Bug fixes.
- The Product Owner and/or Colleague Support Team shall respond to any queries with regards to the priority and estimate timescale or an accepted Enhancement Request.

Raising requests to Microsoft

- All Colleague customers whom have purchased their Microsoft licenses via Colleague Software Limited are entitled to request support regarding Microsoft related enquiries.
- Support Items with respect to Microsoft shall be investigated in line with our Microsoft CSP Agreement.
- The Colleague Support Team will act as an intermediary on behalf of the customer during instances where an enquiry must be raised with Microsoft Support.
- The Colleague Support Team member shall provide the customer with the relevant case ID from Microsoft Support and liaise where possible to provide necessary updates.
- The response and resolution time to these requests is determined by Microsoft, according to the following definitions:

Microsoft ASfP Support Scope	Description	Response Goal	Resolution Goal Times
Severity A - Critical	<p>One or more services are not accessible or are unusable. Production, operations, or deployment deadlines are severely affected, or there will be a severe impact on production or profitability. Multiple users or service are affected.</p> <p>Severity A requires the Customer to be available 24 hours a day or the severity will be downgraded to Severity B.</p>	1 Hour Initial Response Goal.	There are no resolution times defined.

Severity B - Urgent	The Service is usable but in an impaired fashion. The situation has moderate business impact and can be dealt with during business hours. A single user or service is partially affected.	2 Hours Initial Response Goal.	There are no resolution times defined.
Severity C - Important	The situation has minimal business impact. The issue is important but does not have a significant current service or productivity impact for the Customer. A single user is experiencing Partial disruption, but an acceptable workaround exists.	4 Hours Initial Response Goal.	There are no resolution times defined.

- In some cases, Microsoft Support Engineers may require the intervention of the Product Group (the Microsoft Development Team for a particular application). Normally the support request is kept active until the Product Group case is completed. If the support request determines it is a bug, an estimated date and time for deployment will be provided by the Product Group. If the support request requires a design change in the product, the Product Group can accept the change or may reject it.
- Please note: Microsoft's ASfP (Advanced Support for Partners) support policy, scope and process may change at any time.

Colleague integrations and other third parties

- Requests that are related to an integration that is provided as part of Colleague as standard, will be supported by the Colleague Support Team. The user support policy described in this document shall apply to those integrations.
- Requests that are related to a third-party application, tool or integration, not provided as part of Colleague as standard, or not implemented by the Colleague Development Team will not be supported by the Colleague Support Team. Any request relating to such an application, tool or integration should be raised directly with the third-party developer, unless otherwise agreed, separate of this policy.
- Requests that are related to Microsoft 365 (formerly Office 365) or to another product provided by Colleague Software should be raised directly to Colleague Software's Support Team by the Customer.
- If the Colleague Support Team spend time on Support requests that relate to an unsupported 3rd party application, unsupported integration or Microsoft 365, Colleague shall be entitled to charge for all associated time costs. The costs for this are described in the Colleague Consultancy Agreement.

Escalating requests

- The Customer is entitled to discuss reassessment of the Priority of any open Support Item with the Colleague Support Team.
- The Customer is entitled to discuss increasing the Priority of a Bug raised to the Colleague Product Backlog with the Product Owner.

- The Customer is entitled to raise issues with the support service provided by the Colleague Support Team with the Colleague Product Owner and/or Colleague Service Owner.

Amending licenses and authorising changes

- The Customer shall submit requests via Email to change the number of licenses currently applied to the Colleague Support Team.
- In instances of addition or reduction to Microsoft 365 licences, a Colleague Support Team member will respond with the necessary form(s).
- The Customer is entitled to designate the users that are authorised to request these licence amendments and/or approve Consultancy orders.
- The Colleague Support Team shall endeavour to provide a response within one hour of any request being raised to adjust Colleague licensing numbers.
- The Colleague Support Team are entitled to reject any request that is raised if:
 - Support of the request can be fulfilled by the customer's own inhouse Colleague Administrator.
 - The request is related to a Microsoft application that Colleague has not licensed to the Customer.
 - The request does not contain the required minimum information to process the order.

Releases of Colleague to customer environments

- The Colleague Development Team shall endeavour to provide a fortnightly update to the standard Colleague solution. These updates will consist of Enhancements, Bug fixes and minor user interface updates.
- The Customer shall be notified of the intended release date of an update via the Maintenance Schedule page (available via the Colleague Helpfile).
- Prior knowledge of the contents of the update shall be provided via the publication of release notes made available online and distributed via social media, helpfile, blog and email.
- The release shall be undertaken out of Normal Business Hours.
- The Customer shall be notified when a release has been delivered via the 'Notifications panel' available to all users of Colleague.
- The Colleague Development Team are entitled to delay a release of Colleague to the Customer, when there are no changes to release or if an issue is identified which may impact the use of the system.
- The Customer will have access via the Helpfile to the Colleague Roadmap for a longer term forecast on the functionality intended. This content is for informational purposes only and cannot be incorporated into any contract. The information presented is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Any references to the development, release, and timing of any features or functionality described remains at Colleague Software's sole

discretion.

Responsibilities for the Customer

- The Designated Decision Maker and System Administrator roles are required to be fulfilled by the Customer.
- These roles are designed to carry out distinct duties to efficiently manage the system and the collaboration between its users and the Colleague Support Team.
 - The Designated Decision Maker shall be responsible for carrying out the duties below:
 - Organisation and prioritisation (from the Customer's perspective) of Support Items, Enhancements, Consultancy and Bug fixes. As well as communication of these decisions to other internal Stakeholders.
 - Ensuring that requests for Enhancements or Consultancy are clearly expressed to the Colleague Support Team.
 - The sign-off of Consultancy orders and/or agreement to purchase of Consultancy time.
 - The sign-off of additional licenses as required by the Customer.
 - The System Administrator shall be responsible for carrying out the duties related to the configuration of the standard Colleague solution, this includes the following (but may not be limited to):
 - Creation and maintenance of user accounts and Teams hierarchy.
 - Configuration of Colleague settings and third-party integrations.
 - Creation and maintenance of Email and Word Templates and Email Signatures.
 - Creation and maintenance of Lookups, Currencies and their Exchange Rates relevant to the business.
 - Configuration of custom fields, checklists, reports and Back Office workflows.
- When a request for User Support is submitted to the Colleague Support Team the required minimum information must be provided, whenever possible. This will enable a request to be processed according to the terms of this Support Policy.

Fair Usage

Colleague relies on shared cloud resources for data and processing. These limits ensure that the performance experienced by other Customers are not affected.

Fair usage applies to the following features of Colleague:

Feature	Maximum Usage	Overage
CV Parser: Number of CVs submitted for text extraction	1000 CVs per user, per annum, shared across all Colleague users. e.g. 100 users equates to a fair usage of 100,000 CVs per annum.	Should this fair usage limit be exceeded, additional CVs parsed will incur additional charges at our prevailing rates.
API: Number of API call requests made	Persistent high volume usage to the detriment of the hosting server's performance.	Should this fair usage expectation be disregarded, additional charges to support higher grade server specifications will come into effect.