PA SunSystems Solutions Service Level Agreement

Contact Us

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professional advantage

Contents

Overview

Welcome to the Professional Advantage UK Helpdesk. At Professional Advantage (“PA”), we know your success depends on how effectively you can put your finance solution to work, and we know the importance of being there when you need us. Our Client Support Team is here to help you.

Please read through this document carefully as it contains all the information you need to know about our Helpdesk. Also note that this document is subject to change, and the latest version of the document may be requested from our Helpdesk, or it can be downloaded from our website.

This document covers PA Cloud support for all Professional Advantage enhancement solutions installed in PA Cloud.

This document is designed to reflect our current structure and work methods and is a means of communicating to our clients and partners on how we operate. The terms contained in this document are not a binding legal commitment. It is our commitment to giving a high level of client service to all our clients and partners.

To the extent there is any inconsistency between the provisions of this Agreement and the Commercial Agreement, the provisions of the Commercial Agreement prevail.

We welcome your feedback regarding anything in this document, and especially how you feel we are performing.

The Professional Advantage Team

Helpdesk Service & Procedures

Overview of the Client Support Team

Our Team is permanently staffed with dedicated service professionals who use the latest technology to log and answer your queries, research solutions and provide accurate advice.

The Client Support Team is supported internally by local and global consulting, training, quality assurance and programming teams.

The Client Support Team exists to provide a support service to you by logging and solving incidents relating to PA Software either on premise or in the PA Cloud.

Note: *If your application support is being provided by a PA Cloud Solution Partner, please log all support queries via your partner who will then liaise with Professional Advantage.*

Professional Advantage's Responsibilities

The Client Support Team provides a support service for all software applications and components, business solutions and infrastructure provided by Professional Advantage, and which is covered by a current Commercial Agreement. To help resolve your issue, we may need to liaise with other software vendors, where applicable and required.

Please refer to your Commercial Agreement for a full list of responsibilities.

For On Premise Clients

Our primary responsibilities include: -

- Providing guidance and offering tips and techniques regarding existing applications or solutions
- Troubleshooting issues with software applications when you experience unexpected results
- Reproducing product defects and assisting in providing alternative methods to help maintain stability until the defect is corrected
- Notifying you of software maintenance updates from our software vendors

We will: -

- ✓ Take ownership of support cases
- ✓ Agree a priority on your case
- ✓ Keep you informed of progress
- ✓ Escalate issues to PA Managers, other PA Teams and/or vendors as required
- ✓ Keep your customer data confidential
- ✓ Work your case until successfully concluded

For PA Cloud Clients

Our primary responsibilities include: -

- Provision of access to the Cloud Platform during Planned Cloud Platform Hours.
- Proactive 24 hours per day, 7 days per week monitoring of server systems and Microsoft Windows operating system to ensure that the Cloud Platform is available.
- Proactively notify the Client of appropriate issues arising from the use of the Cloud Platform to ensure smooth and uninterrupted operations can continue.
- Install and manage a firewall and anti-virus technology to prevent unauthorised access to the Cloud Platform.
- Take backups of Servers configuration and Client Data that is stored on relevant Cloud Provider environment. This Agreement does not include backups on individual Personal Computers or Client

Data held outside the Cloud Platform. Backups of Client data will be carried out as described in the Disaster Recovery & Business Continuity Plan under *Supporting Reference Documentation*.
- Restore data from backups upon demand from the most recent successful backup. There will be no recovery of Client Data captured after the time of the most recent successful back up.
- Carry out maintenance, updates and enhancements to the Cloud Platform during planned Scheduled Down Time.
- Carry out emergency remedial work as required, which may occur outside of Scheduled Down Time.
- Respond to failures as defined in– *Cloud Platform Service Levels*.

We will: -

- ✓ Agree a priority on your case
- ✓ Keep you informed of progress
- ✓ Escalate issues to PA Managers, other PA Teams and/or vendors as required
- ✓ Keep your client data confidential
- ✓ Work your case until successfully concluded
- ✓ Troubleshoot issues with our software applications when you experience unexpected results
- ✓ Reproduce product defects and assisting in providing alternative methods to help maintain stability until the defect is corrected

Client Responsibilities

We recommend our clients implement the following best practices within your organisation to optimise a stable working environment: -

Appoint a System Administrator

It is important to appoint a System Administrator to take overall ownership of the system and be the main point of contact and liaison between your organisation, your PA Cloud Solution Partner (if applicable), and Professional Advantage. You can appoint more than one system administrator to ensure coverage of all applications. It is expected there will be at least one system administrator available at all times.

Ensure your staff are fully trained

It is important that your staff are fully trained on the functionality of the software and business processes being used by your organisation. This will ensure productive and effective interactions with our Client Support Team. Professional Advantage (or your PA Cloud Solution Partner) are happy to provide training and consulting services to assist you in meeting this objective.

Reporting Software Issues

Please fully document and report all detected errors and malfunctions of your software to help the Client Support Team to diagnose the problem you are experiencing.

Prior to contacting the Client Support Team, please ensure you collect the required information and perform some initial investigation as outlined in the section "Before contacting the Client Support Team".

Respond promptly

To assist in the timely resolution of your case, please respond promptly, clearly and comprehensively to any requests from your Client Support Team for additional information.

Keep your Annual Maintenance & Support or PA Cloud Subscription current

To ensure continued service, it is important that you keep your Annual Maintenance & Support or PA Cloud Subscription and Commercial Agreement current. If your maintenance or subscription fees are not paid, you are not entitled to support . For PA Cloud sites, your PA Cloud Platform may be deactivated.

Support Services

Support Hours

Our Help Desk operates during the hours between 9:00am and 5:00pm GMT, Monday to Friday, excluding UK public holidays (Support Hours).

After Normal Support Hours

The Client Support Team offer a 24-hour contact service. Three options are available to you depending on the urgency of your problem.

1. **Option 1**

Log your support case via our Client Portal (eService). A support consultant from one of our offices will take ownership of your call during normal support hours.

2. **Option 2**

Leave a voicemail message with your company & contact details, plus a brief description or your problem and a support consultant will return your call at the earliest opportunity during normal support hours.

3. **Option 3**

For urgent issues, you can phone our Sydney Client Support team on: +61 1300 658 608. Use this telephone number after UK business hours (and during Sydney working hours) if you need to speak with a Helpdesk consultant.

On Call Support

If you need out of hours support, you can pre-arrange to have your call diverted to a mobile phone. There is a minimum charge, (double time at weekends), to divert your call to the on-call Support consultant who will determine the appropriate next course of action.

Help Desk Contact Information

Our team can be contacted via:

Portal: https://www.professionaladvantage.co.uk/suneservice/eservice

Email: support_uk@professionaladvantage.co.uk

Telephone: +44 (0) 207 268 9802

Note that we cannot guarantee a response where a Support Case has been reported by any other method.

If there is a requirement for assistance outside of the Support Hours, you may request this in advance and assistance will be on a chargeable basis.

Client Portal (eService)

http://www.professionaladvantage.co.uk/eService

When a new case is entered via the Client Portal, it automatically updates our support database, and is automatically routed to the relevant product support team for assignment to the next available support consultant.

We encourage you to log your support incidents online – a very efficient method that assists in enabling our Client Support Team to quickly begin analysing your issue and researching the resolution. In addition to logging a new case through online support, you can also access other services and capabilities including: -

- Ability to view the status and full history of your support cases
- Ability to update existing cases
- Search our extensive knowledge database
- Review the latest News and Product Information

This is the preferred route to log a call as it provides a holistic view of all calls and their history.

How to register for eService

To register for eService, go to *http://www.professionaladvantage.co.uk/eService*. Click on the “Register” button and complete all details. Your User Name and Password will be emailed to you within the next working day.

Telephone

UK Support: +44 (0) 207 268 9802.

Global Support:+ 61 1300 658 608. Use this telephone number after UK business hours (and during Sydney working hours) if you have an urgent issue and need to speak with a Helpdesk consultant.

Email: Support_uk@professionaladvantage.co.uk.

Logging & Reviewing your Support calls

http://www.professionaladvantage.co.uk/eService

Select eService Requests and enter your registration details. eService is an online client support centre that offers you the following services 24 hours per day, 7 days per week.

- ✓ the ability to log new support calls
- ✓ the ability to review your support calls
- ✓ search our knowledge database
- ✓ submit client satisfaction surveys

The benefit to us of you using eService to log your support calls, is that we can quickly allocate calls to the correct product support specialist, resulting in a more timely resolution to you.

Term	Definition
New Request	To log a new support call, select “New Support Call” and complete all details. Files may also be attached. The “Full Description” should include information detailed later in this document. New Requests are automatically logged in our support database and allocated to the product support specialist by the Team Leader. eService is updated every 15 minutes, so you will be able to see your new service request online approx. 15 minutes after logging
View Service Requests	You can view the status and full history of your service requests online:- ▪ All – enables you to search all your previous support calls by error message, reference or module. Updates to Service Requests are online within 15 minutes
Knowledge Search	You can search our Knowledge database by filtering by product and sub-module or date.
Products	The Products selection will give you access to Product Overviews, Version release details and Reference Manuals
Version Release Details	The Release Schedule gives a detailed list of available versions and compatibility with SunSystems versions.

Case Management

The general definition of a support case is any instance of a request for assistance, or a question fully and accurately logged within the PA Help Desk system, that is related to software operation, to software keys, or to information requests about software offerings. Other commonly used names in this document for a case are incident, issue, call, and log.

Before contacting the Client Support Team

Do some initial investigation

Refer to, or liaise with, your internal Systems Administrator or Systems Accountant to:

- Test the problem using your test environment
- Review available reference guides, training guides or online help
- Search the online Knowledge database on our client portal

Collect information

The speed and efficiency with which support cases can be resolved may be directly affected by the quality of information provided.

Please review the list of important information below and have this information available when you log your incident (whether via the Client Portal, phone or email). Doing so will help accelerate the process of accurately diagnosing the problem.

- Your company name
- Your contact details (name, email address, and contact number)
- Product name and version number of the applicable installed software
- Details of the incident (e.g., error messages and how to reproduce the error). If you are logging via the Client Portal, please include screen shots, failed reports, transaction logs, trace files, or other supporting documentation.
- Description of the problem's frequency & predictability (e.g., intermittently, each time function is used, etc.)
- Description of the problem's impact (e.g., does it impact all users)
- Details of any recent configuration changes to your solution

Logging the Support Case

Please refer to "*Help Desk Contact Information*" to correctly log your support issue.

When your support issue is logged with the Client Support Team, it is assigned to a product specialist (the "case owner"). Clarification of the issue may be necessary before in-depth analysis can be performed and before the product specialist can begin to resolve the incident.

There will always be a case owner assigned to each issue, however, this person may change during the resolution process. As part of managing the case details, the status and commit times of every case will be agreed with you.

Each Support Case must have a unique reported problem or question and Support Cases cannot be “overloaded” with multiple reported problems or questions.

All issues are given a Support Case number. All Support Cases will be managed to conclusion and Support Cases will be closed following notification from the Client, or after two attempts to contact the Client have been made by PA.

In instances where the Support Case relates to a Third-Party Product, and is unable to be resolved by PA, and is escalated to the relevant third-party vendor for which PA is the Client’s partner of record with the third-party vendor, PA is subject to the third-party escalation and response times of that organisation, details of the response times of third-party vendors will be provided to the Client.

In instances where the Support Case indicates that a problem is originating in a Third-Party Product not represented by or sold to Client by PA (i.e. operating system, database, networking, etc.), PA will engage with the third party as needed, however the Client (not PA) is responsible and must take lead in creating, maintaining, and coordinating a Support Case with said third party The Client can nominate up to two representatives who are entitled to contact the client support team on behalf of the Client. These representatives are required to be trained by PA in the use of the Products.

Severity Levels & Response Times

When assigning a severity level to your support case, please consider the severity of the problem, the business impact to your organisation, and whether there is a suitable workaround available.

When submitting a Support Case, assign the call a priority based upon the table below. PA reserves the right to reassign a priority level. PA will use the severity level to prioritise all outstanding Support Cases. All Support Cases, irrespective of severity level will follow the same resolution pathway. PA’s priority taxonomy with response-time targets are:

Priority	Severity Description	Example	Target Response Time
1	Critical	Your entire system is inoperable, and your organisation is critically impacted	1 hour
2	High	You cannot use the system, or a function of the system is not working correctly and is affecting your processing. No workaround is available. Your business is severely impacted.	3 hours
3	Medium	A function is not working correctly but is not mission critical. Often a workaround will exist although the issue does need to be resolved. Your business is not seriously affected.	5 hours
4	Low	A question or request for information regarding existing systems, new product or functionality.	One business day

The above targets represent PA’s goal in serving our clients, but do not impact the terms of any agreement should PA not meet these targets. All clients are provided escalation information in the signature line of each Support Case e-mail, which can be utilised if any concerns arise with any aspect of PA’s client support services.

Resolution Times

Case resolution is often an investigative process that is iterative, with many variables, and often requires collaboration and troubleshooting by various teams to determine the root cause in order to bring your case to resolution. As a result, providing target resolution times is difficult. We do commit to providing regular updates as we progress through the troubleshooting process, and we will continue to work the issue until it is resolved.

Interactive or Remote Access

The support consultant may suggest an interactive web-based support session, or request remote access to your system, where further clarification of an issue is required, or to facilitate case resolution. Clients will be asked to give permission to our support consultant prior to us making a connection to your system.

Closing a Case

It is important that the support consultant agrees closure of a case with the client. If more information has been asked of you and we have received no feedback to our requests for a reasonable length of time, the support consultant or Support Manager may close the case log and will notify you accordingly. The case may be reopened by you if you believe the issue is not resolved.

If a software patch has been issued to you, we will close the call only after you have confirmed to us that the patch has worked, or 60 days after issuing the patch if no feedback is received - whichever is the later.

Where an issue is resolved in a specific version of software, and that version of software is then released, we will close the call within 60 days after notifying you and your Account Manager of its availability for implementation on PA Cloud.

As noted above, all Support Cases will be managed to conclusion and Support Cases will be closed following notification from the Client, or after two attempts to contact the Client have been made by PA.

What the Client Support Team Do

✓	Logs your incident into our Helpdesk database	eService will log your support call automatically into our Helpdesk database. For calls not logged via eService, please ensure all the relevant information requested in in the Collect Information section is available to give to the support consultant. The Support Consultant will log your incident into our Helpdesk database. A unique tracking number is generated for each new incident.
✓	Agrees a priority on your call	We agree a call priority with you. The status of these calls will be reviewed regularly to ensure that correct priority is assigned.
✓	Keeps you informed online	The status and full history of all support calls is available for your review via eService.

✓	Escalates the incident to other departments within Professional Advantage.	In the event the Helpdesk is unable to solve your incident, we escalate the incident to other departments within Professional Advantage.
✓	Utilises Interactive Support	Our Helpdesk has the ability to directly view what you're seeing and/or doing by logging into your system using a standard internet browser. Microsoft Teams works with existing firewall technology, password protection and encryption to protect sensitive data.
✓	Identifies your training needs	The number of calls placed with the Helpdesk is monitored on a monthly basis. If it appears that any of your staff require training in specific products or technical areas, we will suggest customised training, to help that person.

Support Cases Included

A. Emergency support inquiries for system-down or critical problem diagnosis and resolution.
B. Correcting errors or other problems in the Products in an appropriate time, or issuing instructions to Client's designated contacts as to how to resolve the problem in order to resume operation of the Products to operate in a manner reasonably satisfactory to Client until the problem can be fully corrected by PA.
C. "How-To Support" questions regarding user or administration application functionality and usability. Examples include: where to find features, minor task instruction, and functionality clarification.
D. Support for Customisations developed by PA will only be supported on a time and materials basis.

Support Cases Excluded

The following list of activities, which is not exhaustive, are EXCLUDED from the scope of Support:

1. Problems arising from Client performed installations or upgrades where PA did not sign off on the installation or upgrade.
    a) PA will not provide Support for Products implemented or upgraded without the assistance of PA.
    b) PA Professional Services may be engaged by Client to participate in any resulting clean-up activities arising.
2. Problems arising from data imports or data conversions.
3. Consultative activities:
    a) Creation of reports and dashboards, or non-performance of reports and dashboards created or altered by Client.
    b) Complex usage questions addressed during training in the implementation phase
    c) Training (user or administrator)
    d) System setup, configuration, or re-configuration
    e) Solution installation

   f) Report writing
   g) Software development
4. In-House IT responsibilities relating to your environment, not PA Cloud, such as:
   a) SQL Server database management
   b) Windows Server, Windows Client setup and administration
   c) Security policy setup and administration
   d) Networking and connectivity issues
   e) Data repair
   f) Data quality management
   g) Data or system reconciliation
   h) Cleaning devices of malware and viruses
   i) Resolution of issues caused by incompatible or unstable software not provided by or represented by PA.
   j) Troubleshooting computer devices at the Client's locations, i.e., machines (computers, printers, devices) which do not form part of the applications you use.

Defect Repairs

At PA's discretion, PA may provide a software defect repair to the client based upon a variety of decision factors.

Defect repairs will be made in the latest service pack of a Supported Version. To illustrate the intention, if a client is on Version 22.1 but the current active point release is 22.1.2, then a new defect repair will be released via 22.1.3 and the Client will be required to accept said defect repair in 22.1.3.

The charge for any Professional Services associated with the application will be charged on a time and materials basis.

Chargeable Helpdesk Activities

Chargeable services offered by the Helpdesk include the activities mentioned below. The Client Services Manager will determine whether these activities can be performed by the Support Consultants, or whether they will need to be referred to the Professional Services Consulting Team.

The Support Consultant will advise you if any activity is deemed to be chargeable and will seek your approval to proceed in the form of a Statement of Work outlining the activity and expected charge.

Minor Data Repair	The Support Consultant may identify data corruption requiring repair. Where the data corruption is only minor, repair may be performed by the support consultant. Major data corruption will be to the Professional Services Consulting Team where it will be chargeable on a Times and Materials basis and subject to the availability of resources.
Minor Report Writing	The Support Consultant may identify a requirement to amend reports or report definitions. Where the requirement is only minor, report writing may be performed by the support consultant, otherwise it will be referred to the Professional Services Consulting Team where it will be chargeable on a Times and Materials basis and subject to the availability of resources.
Professional Services	The Support Consultant may arrange services, either onsite or remote, where it is deemed to be necessary in resolving a Priority 1 incident. Professional Services are chargeable on a Time & Materials basis.

PA Cloud Platform Service Levels

Cloud Platform Availability

The Cloud Platform will be provided during Planned Cloud Platform Hours (24hrs) less any Excusable Down Time (any Down Time due to an Excusable Failure or any Scheduled Down Time).

Access may be available during Excusable Down Time, but such access is not part of the conditions defined in within your Commercial Agreement.

Your responsibility is to ensure that you promptly notify PA if you are unable to access the Cloud Platform.

PA's Responsibilities

1. Give you prior notice for Scheduled Down Time.
2. In the event of an emergency shutdown is required, PA will attempt to contact you beforehand, but failure to make contact will not preclude PA from continuing with an emergency procedure.

3. PA will notify you as soon as practical if the Cloud Platform is unavailable. This notification from PA could be in the form of a telephone call, voice message, support log update, or e-mail.
4. The Cloud Platform will be deemed unavailable when PA's records show that it is not possible for you to access a Product or view content. You may be given access to these records upon request.
5. The Cloud Platform ceases to be unavailable at the time when PA notifies you that the Cloud Platform is available. This notification from PA could be in the form of a telephone call, voice message, fax or e-mail.
6. The Cloud Platform will not be unavailable in accordance with this clause, and you will not be entitled to claim a Cloud Platform rebate, if PA determines that the delay or unavailability of the Cloud Platform was caused by:
   - an Excusable Failure;
   - Scheduled maintenance (advance notice of which is provided to the you as the Client), to the extent it does not exceed the maximum period (if any) that PA allows for scheduled maintenance of the Cloud Platform; or
   - Cloud Platform suspension in accordance with the Agreement.

Cloud Platform Rebates

1. The Cloud Platform rebate entitlement for the Cloud Platform being unavailable is calculated in accordance with Table 1.
2. A Cloud Platform rebate is not redeemable for cash and in any month is capped at the relevant specified percentage of the monthly Subscription Fees. You must claim any Cloud Platform rebate in writing within 30 Business Days from the date on which it becomes possible to calculate the amount of the Cloud Platform rebate.
3. Once a claim is made in accordance with this clause, PA will calculate the Cloud Platform rebate (if applicable) for the Cloud Platform and credit to your account the amount equal to the Cloud Platform rebate.

Table 1 - Cloud Platform Rebates for unavailability to the Cloud Platform

0-1%	0%
1%-2%	10%
2%-3%	15%
3% or more	30%

Cloud Platform Service Level Targets

As per the following table

Function	Tasks	Frequency				Time
User Help Desk Response in PA Business Hours	Call Response	100% of cases are logged within 1hr (PA Business Hours) of call				GMT/BST
	Engineer Allocation Response	Priority Level*				GMT/BST
		Low=24hrs	Medium=5hrs	High=3hrs	Critical= 1hr	
	Targeted Fix	Best endeavors (target is 4hrs)				GMT/BST
	Update Client	1hr from problem resolution				GMT/BST
Monitoring Logs	Logs reviewed daily	Proactive Response on Critical Alerts				GMT/BST
Fault Resolution Actions	Unplanned Shutdown	1 working hour notice unless due to circumstances outside of the control of PA				GMT/BST
System Maintenance	Scheduled Down Time	Minimum 3 Days' notice given to Client				
		No more than 8hrs per month planned if necessary				After 6pm GMT/BST
		No more than one planned downtime per working week				After 6pm GMT/BST
	Virus checking	Regular scanning and one system check per day				After 6pm GMT/BST
User Administration in PA Business Hours	Add, Change, Delete users	8hrs				GMT/BST
	Password reset	4hrs				GMT/BST
Cloud Platform Availability	Uptime	98%				24 hours per day – calculated 3 monthly

Excusable Failure

PA will not be responsible for any failure ("Excusable Failure") to meet the Cloud Platform Levels to the extent such failure is caused by:

- any failure caused by you, the Client;
- any failure attributable to telecommunications carrier Cloud Platforms;
- any catastrophic failure attributable to Cloud Provider;
- unauthorised changes made to the operating environment used to deliver the Cloud Platform (for example, installation of applications that are not tested and approved for production use); or
- circumstances that constitute a Force Majeure Event.

Confidentiality of Client Data

In order to investigate a support case, a client may be requested to disclose to Professional Advantage certain confidential information regarding their business.

In consideration of such disclosure, Professional Advantage undertakes and agrees to keep the client's Confidential Information confidential and to maintain that confidentiality.

"Confidential Information" means all information passing from the client to Professional Advantage including but not limited to databases, trade secrets, confidential business information, client information, profit and loss statements, management reports, financial data, and related documentation and/or information.

Please refer to the Privacy Notice and Confidentiality clauses in your Commercial Agreement, as well as the GDPR Appendix.

Client Support Team Engagement

As part of our ongoing management of your account, Professional Advantage will review your overall engagement with the Client Support Team. The objective of the review is to ensure that you are utilising our services effectively and efficiently.

Part of this review will relate to the volume of cases managed in line with your annual maintenance value. If it is determined that your volume is above the threshold of reasonable use, we will work with you to rectify this imbalance.

Escalation or Feedback

To Escalate a Support Calls or give Feedback on our Service please contact one of the following:

- Leisa Vasil – Client Support Manager. Leisa.vasil@pa.com.au
- Andrew Parsons – UK Country Manager. Andrew.parsons@professionaladvantage.co.uk
- Nikki Noble – Partner Manager. Nikki.noble@professionaladvantage.co.uk

Other Services

Professional Advantage has a Professional Services team offering remote or on-site application consulting services to clients. These services are charged on a Time and Materials basis and include:-

- installation of application software and/or patches,
- technical health check,
- performance issues,
- troubleshooting, implementation,
- development of program specifications,
- optimisation reviews,

- project management,
- report writing.

Customisations

Professional Advantage is able to offer full services to undertake enhancements, modifications to our software, and full product customisations. These include:-

- functional specification,
- programming,
- software testing and quality assurance
- documentation

Enhancements are generally chargeable to the client on a Time and Materials basis. All quotations must be approved by you, the client prior to work commencing.