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Support Services Policy for Access Education including Success Plans

v0.4 March 2017

Support Success Plans

We recognise that customers have different support requirements and to reflect this you will be offered a choice of Support Success Plans for the majority of our SaaS Education products.

Education Basic Success Plan is our basic (and inclusive) support offer, providing an on-line (Web and KnowledgeBase) support service.

Education Standard Success Plan extends this basic service with *enhanced reactive services*, including telephone support between the hours of 8.00am and 6.00pm Monday to Friday excluding Public Holidays and other dates/times notified on the website.

Education Premier Success Plan builds on the Standard Success Plan with *additional proactive services*, including assigned customer success manager with quarterly and annual reviews together with a named Support Advisor.

More details on the key services of each Success Plan can be seen below.

	Basic Success Plan	Standard Success Plan	Premier Success Plan
On-Line case submission (Web, email and chat)	✓	✓	✓
Access to on-line Knowledge Base	✓	✓	✓
Assistance on "How to" questions ¹		✓	✓
Telephone case submission		✓	✓
Priority support case handling		✓	✓
Named Support Analyst			✓
Quarterly Support Review			✓
Annual account review			✓
Access to Customer Success Manager			✓
Service Hours	09:00-17:00 Mon-Fri	08:00-18:00 Mon-Fri	08:00-18:00 Mon-Fri
Option for extended hours support ²		✓	✓
Fastest Response Time ³	2 Business Days	1 Hour	1 Hour
Proactive Case updates ³	-	Hourly	Hourly

¹How to questions should not be seen as a replacement for training

²Will require an incremental support charge if customer want hours beyond 08:00-18:00 Mon-Fri

³Times specified are for priority 1 cases.

Education Classic Plan has been designed specifically for our existing customers who are/were in contract on the 1st April, 2017. The option to migrate to one of the Success Plans listed above will be provided at your next renewal date. Your Account Manager will be available to discuss the options with you in more detail prior to renewal. Classic Success Plan customers have access to Support between the hours of 8.30am and 5.30pm Monday to Friday (excluding public and Bank Holidays together with any dates/time separately notified to you). The Support team are available to respond to your enquiries via email, chat, web enquiry or telephone. Access Support aim to initially respond to all Support enquiries either with a resolution, agreed next step or an acknowledgement of the question within 24 hours of your initial contact. We aim to complete all data investigations/corrections within 5 working days and will keep you updated on progress through to resolution.

Software Support

Providing you with a high level of technical support is of prime importance to us. As well as being able to answer your technical support queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product.

For customers on Education Standard Success Plan or Education Premier Success Plan, our support staff will also provide best efforts to help answer How-To type questions on the use of your Access solution. If the support staff feel that they are spending too much time answering How-To questions, we reserve the right to recommend suitable training courses.

This policy applies to all customers who have Support included within their package and Access have received payment for this service.

Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first time contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

Logging a Support Case

Support can include: telephone, email and remote dial up support (dependent on your Success Plan), during the working hours specified in your Success Plan. (Exclusions are listed on page 4 of this document)

Education Basic Success Plan	Education Standard Success Plan	Education Premier Success Plan
log cases via email, Web and instant chat	log cases via e-mail, Web, instant chat and phone	log cases via e-mail, Web, instant chat and phone

The quality of information you provide the Support Team when you log a support case has a direct impact on the speed at which it can be resolved. Before you contact us, check all available documentation to determine whether the situation you are experiencing is a normal system operation.

Please have the following information to hand before logging a case:

- ◊ Your name, establishment name, post code and telephone number
- ◊ What feature of the system are you trying to use?
- ◊ Have you used this feature before?
- ◊ What were you expecting to happen?
- ◊ What is happening?
- ◊ The precise nature of any error messages (screen shots will help)?
- ◊ Is the problem common to all users?
- ◊ Has the problem occurred before?
- ◊ Has this feature worked previously?
- ◊ If so has anything changed?

- ◊ Is the problem reproducible?
- ◊ If so what are the exact conditions?

All support cases you place with Access via the Support Centre will automatically be allocated a unique ticket number and the person taking your call will provide you with this number for your future reference.

If your call concerns a number of separate issues, please indicate this so that each problem may be logged separately.

PLEASE NOTE: In order to assess the quality of the service that we deliver, and to aid staff training, your calls may be recorded.

Case Closure

Whenever a support query is resolved by us we will contact you, either by phone or email, to confirm that you are happy with the resolution

Support Knowledge Base

We recognise that many people work outside standard office hours or like to find solutions themselves using on-line "help". To assist with both of these scenarios Access has a support knowledge base, which can be used by any Access customer to find answers to simple or common questions.

The HCSS Accounting knowledge base is a website that can be accessed from any device with an internet connection at any time, please go to <http://www.hcsseducation.co.uk/Accounting-training-manual-abcxyz> . The HCSS Budgeting knowledge base can be located in the help section of your software.

If you are unable to find the answer to your problem in the knowledge base, please log a case following the guidelines below.

Case Logging Methods

Log your cases on the Web, email and instant chat - *This is our preferred method of receiving your ticket and the ONLY option for customers on the Education Basic Success Plan.*

This allows us to route your case directly to the most appropriate Advisor. You may also log your cases via the email addresses listed below or via our instant chat facility:

Product	Email
HCSS Accounting	support.accountinghcss@theaccessgroup.com
HCSS Budgeting	support.budgetinghcss@theaccessgroup.com
HCSS Curriculum	support.budgetinghcss@theaccessgroup.com
HCSS SEND Funding	support.budgetinghcss@theaccessgroup.com

Log your ticket via telephone

You may only log a call via telephone if you are on Standard or Premier Success Plans.

Please use the following telephone numbers to access the relevant Support team. Before calling, please prepare as much information as possible about the software version you are using and the issue that you need help on.

Product	Tel
HCSS Accounting	0845 340 4547

HCSS Budgeting	0845 340 4546
HCSS Curriculum	0845 340 4546
HCSS SEND Funding	0845 340 4546

Exclusions

Support is provided on Access software. Other 3rd party applications may be supported via specific arrangement using telephone, email and remote dial up support during normal working hours

Unless specifically referenced or the site is Hosted by Access the service does not cover support of the surrounding IT infrastructure including operating systems, networks, comms, SQL Server (including Database Backups and Restore, Database maintenance and housekeeping), Citrix, Terminal Server, and IIS as examples. For further details of the Hosting Services that Access is able to provide please refer to <http://www.theaccessgroup.com/solutions/hosting/>

The following matters are expressly excluded from the service but may be provided subject to a separate arrangement.

- Telephone Training
- Tax, accountancy or business advice
- System installation or implementation*
- Data transfer services
- Site visits
- Investigation into or corrections to data loss or corruption
- Installation of software of version upgrades*

*If the site is hosted by Access the installation of Access products would be performed by Access

Hours of Support

Telephone support is provided based on the hours in your Success Plan

Basic Success Plan	Standard Success Plan	Premier Success Plan
09:00-17:00 Mon-Fri excluding English Bank Holidays	08:00-18:00 Mon-Fri excluding English Bank Holidays	08:00-18:00 Mon-Fri excluding English Bank Holidays

We operate a reduced service over the Christmas period typically 24th December to 2nd January. This service provides support for P1 and P2 issues (see below for definitions), whilst other priority issues will be logged and progressed time allowing.

Remote Support

Remote Support is available by internet based remote control services (TeamViewer currently).

Access has a Microsoft ISA firewall acting as a VPN server across the internet on a permanent ADSL connection using 1 fixed IP Address. We support Client based VPN connections across the internet using LT2P/IPSEC with certificates or pre-shared keys supporting the NAT-T traversal protocol. The customer will need to configure their own VPN and internet connectivity.

Case Escalation & Priority

When you place a call, or when a Support Advisor initially responds, the nature of the problem will be discussed with you. From this discussion an appropriate priority will be agreed and recorded against your support log entry on the database. It is important that you agree this priority with the Support Advisor. Guidelines for the priority of a support case are shown in the table on the following page.

Escalation Process

Your case will then be escalated based upon its priority level. All actions are recorded to ensure an accurate record of the case history is maintained. If at any time a case reaches an escalation point, notifications are sent to personnel within Access to ensure visibility of problems and to make sure that appropriate resource is allocated to solving the problem.

Level	Personnel
One	Support Advisor
Two	Support Manager
Three	Head of Support

The simplest method for a customer to escalate an issue is to request escalation with the person dealing with your case at that point in time.

Named Support Analyst

Customers on the Premier Success Plan will be assigned a nominated Support Advisor. The advisor will have product knowledge related to your main product. We will make reasonable endeavours to route all your cases to this Support Advisor. In this way you will deal with a familiar 'face' and the named support advisors will learn more about your deployment and use of the software.

Please note this is not a dedicated support advisor - there will be times when they are already dealing with another customer when you call, or of course they maybe on holiday.

Submitting cases on-line will provide the best chances of routing your tickets to your nominated Support Advisor.

Customer Success and Support Case Reviews

For Premier Success Plan customers you will receive reviews (quarterly, bi-annually or annual dependent on your level of spend) hosted by a Customer Success Manager who will focus on how you are consuming your Education service, summarise data from your environment and look to provide guidance to improve your adoption of the service as well as gather your feedback. At the same time a Support case review will take place, led by the Customer Success Manager. These reviews we will provide a support case report, analysis and provide any insights from analysing this case history and nature of the cases. Where possible we will provide guidance and pointers to any relevant knowledge base articles, on-line training or other training.

CASE PRIORITY & SERVICE LEVEL OBJECTIVES (SLO)

Priority Level	Description / Examples	Response Target	Update Target & Escalation
P1 (critical)	<p>Severe system failure.</p> <p>Majority of Users unable to access the system due to a failure in an aspect of the software critical to the business.</p> <p>Examples :</p> <ul style="list-style-type: none"> ◦ Server down ◦ All users unable to login. ◦ All users unable to perform a critical function 	<p>First technical Contact (FTC) is defined as the time the assigned (or named) support advisor contacts you about the Ticket.</p> <p>FTC response time target:</p> <p>Education Basic Success Plan 2 business Days</p> <p>Education Standard and Premier Success Plans 1 working hour</p> <p>Note: In the case of all Education services, if all users</p>	<p>Updates are provided Hourly for Education Standard and Premier Success Plans</p> <p>Escalation:</p> <p>Senior Support Advisor immediately notified who will assist as required and use additional / Senior resources as required.</p> <p>2 hours after FTC if no resolution has been found the Support Manager will be notified. For Education Premier Success</p>

		are unable to access the service then Education Basic Success Plan customers will also receive a 1 hour response target.	Plan customers a Customer Success Manager will also be notified.
P2 (high)	<p>This would occur when an entire process is down or cannot function and there is a time-critical business need</p> <p>Examples :</p> <ul style="list-style-type: none"> ◊ Unable to process invoices ◊ Unable to run Period End ◊ Statements not printing preventing credit control processing ◊ Unable to process a time-critical payment run 	<p>FTC response time target:</p> <p>Education Basic Success Plan 2 business Day</p> <p>Education Standard and Premier Success Plans 2 working hours</p>	<p>Updates:</p> <p>Updates are provided 2 Hourly for Education Standard and Premier Success Plans</p> <p>Escalation:</p> <p>Senior Support Advisor notified within 1 working hour who will assist as required and use additional / Senior resources as required.</p> <p>6 hours after FTC if no resolution has been found the Support Manager will be notified. For Education Premier Success Plan customers a Customer Success Manager will also be notified.</p>
P3 (normal)	<p>Incidents affecting a single User and/or non-critical function. User would like the ticket closed as promptly as possible but not urgently. Not affecting day-to-day operations.</p> <p>Examples :</p> <ul style="list-style-type: none"> ◊ Reporting discrepancy ◊ Unable to run reports ◊ Error message received that only affects isolated transaction(s) ◊ Unexpected behaviour from a software feature of function ◊ Dashboard not accessible ◊ User Support Issues 	<p>FTC response time target:</p> <p>Education Basic Success Plan 2 business Days</p> <p>Education Standard and Premier Success Plans 4 working hours</p>	<p>Updates: For Education Standard and Premier Success Plans customers updates are provided every other day unless otherwise agreed with the client</p> <p>Escalation:</p> <p>Senior Support Advisor notified after 2 working days maximum who will assist as required and use additional / Senior resources as required.</p> <p>After 14 days if no resolution has been found the Support Manager will be notified. For Education Premier Success Plan customers a Customer Success Manager will also be notified.</p>
P4 (low)	<p>This allows us to identify that the problem is only material to the person making the request and is not important or pressing.</p> <p>These tickets will be rare.</p> <p>Examples :</p> <ul style="list-style-type: none"> ◊ Reporting discrepancy identified but not holding up processing or deemed serious. ◊ Minor mis-posting that needs correcting. ◊ Queries on aesthetic elements of the software or help ◊ Data reconciliation queries (where we are happy there is no underlying fault). 	<p>FTC response time target:</p> <p>Education Basic Success Plan 2 business Days</p> <p>Education Standard and Premier Success Plans 1 business day</p>	<p>Updates:</p> <p>For Education Standard and Premier Success Plans customer updates are provided every 4 days unless otherwise agreed with the client</p> <p>Escalation:</p> <p>Senior Support Advisor notified after 4 working days maximum who will assist as required and use additional / Senior resources as required.</p> <p>After 1 month if no resolution has been found the Support Manager will be notified. For Education Premier Success Plan customers a Customer Success Manager will also be notified.</p>

CASE PRIORITY, RESOLUTION/AGREED NEXT STEP TARGET

In addition to providing a SLO for response and update timescales for support cases, we have internal targets for resolution/agreed next steps. We are sharing them with you so that you have a better understanding of how quickly any issues you raise with Access Support are likely to be resolved/next steps agreed. These are non-contractual and allow internal measurement and provide process improvement opportunities.

The targets are based on the support service on all products and it should be noted that resolution times do vary across our product range due to the complexity of the solution.

Priority Level	Description / Examples	Resolution Target*
P1 (critical)	<p>Severe system failure.</p> <p>Majority of Users unable to access the system due to a failure in an aspect of the software critical to the business.</p> <p>Examples :</p> <ul style="list-style-type: none"> ◊ Server down ◊ All users unable to login. ◊ All users unable to perform a critical function 	<p>ASAP but within 4 working hours of FTC if resolution is within suppliers control and no delay from other parties.</p> <p>In the case of a major hardware failure this response target excludes those cases where a full software install is required which will not be deliverable from the Support Staff.</p>
P2 (high)	<p>This would occur when an entire process is down or cannot function and there is a time-critical business need</p> <p>Examples :</p> <ul style="list-style-type: none"> ◊ Unable to process invoices ◊ Unable to run Period End ◊ Statements not printing preventing credit control processing ◊ Unable to process a time-critical payment run 	<p>75% of issues resolved or workaround provided within 4 working hours of FTC</p> <p>This is on the basis that this is within suppliers control and there is no delay from other parties.</p> <p>Target all tickets to be resolved within 2 working days of FTC</p>
P3 (normal)	<p>Incidents affecting a single User and/or non-critical function. Client would like the ticket closed as promptly as possible but not urgently. Not affecting day-to-day operations.</p> <p>Examples :</p> <ul style="list-style-type: none"> ◊ Reporting discrepancy ◊ Unable to run reports ◊ Error message received that only affects isolated transaction(s) ◊ Unexpected behaviour from a software feature of function ◊ Dashboard not accessible ◊ User Support Issues 	<p>80% of issues resolved within 24 working hours of FTC</p> <p>Target all tickets to be resolved within 4 working days of FTC</p>
P4 (low)	<p>This allows us to identify that the problem is only material to the person making the request and is not important or pressing.</p>	<p>5 working days of FTC</p>

	<p>These tickets will be rare.</p> <p>Examples :</p> <ul style="list-style-type: none">◊ Reporting discrepancy identified but not holding up processing or deemed serious.◊ Minor mis-posting that needs correcting.◊ Queries on aesthetic elements of the software or help◊ Data reconciliation queries (where we are happy there is no underlying fault).	
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Resolution Target* - This refers to tickets that are resolved by the support team and exclude issues that are passed to the development team for code changes.