ThreeSixty and CommUnity Support Handbook

Personify

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Contents

Using this Handbook

This handbook contains important information on the procedures and practices followed in support of your Personify system. It will provide information on ticket management activities to address problems based on their severity level. Following the processes described in this handbook will improve your support experience when contacting us for assistance or when using our online resources.

- For the purpose of this document, "Product" or "Application" shall refer to the following Personify products: ThreeSixty, ThreeSixty YMCA & JCC, and CommUnity,
- We reserve the right to make changes to this Handbook and the related processes at any time. Please reach out to your Account Manager to make sure you have the latest version of the Handbook.

Functions of Client Support

The Client Support team researches reported issues, answers questions on how our products should work, corrects incorrect data caused by code deficiencies, corrects documentation to align with product behavior, develops workarounds for code deficiencies, and corrects code deficiencies where feasible.

Below is an explanation of each of the services the Support team provides.

Product Questions

Client Support will answer "how-to" questions on the base functionality of our products.

Documentation

If there is a discrepancy between base or custom functionality and documentation, we will amend the documentation and correct incorrect data created by the discrepancy. If there is an omission in base documentation, we will amend the documentation upon notification of the omission.

Identification of code deficiencies

In cases where the functional behavior of the application does not align with its expected behavior, our primary goal is to provide a fix to the code to correct the deficiency. Please reference the Defect Resolution Process outlined within this document for more information.

Customizations (ThreeSixty and ThreeSixty YMCA & JCC)

Client Support will only correct issues related to enhancements or customizations that were developed by Personify Professional Services. We will work to resolve issues relating to custom code when it is no longer behaving in accordance with the original design. Most commonly, this occurs when a core system fix has been applied, such as a Base Defect.

Customer Support will not fix issues that arise as a result of any changes introduced by the client.

Ticket Submission

Why is it important to submit a ticket?

A ticket creates a visible record of the reported item and captures all information surrounding an issue. By containing all the information in one ticket, the support team will gain a holistic picture of the issue, which leads to faster resolution times.

Who can submit a ticket?

Tickets can be submitted and viewed by your organization's primary support contacts. By default, we issue two (2) support portal user licenses for each customer. Please reach out to your Account Manager if you require additional support portal user licenses.

How do you submit a ticket?

You can access the support portal in the following ways:

- Personify Home Page: Navigate to https://personifycorp.zendesk.com/hc/en-us and select "Submit a request" in the upper right-hand corner of the screen.
- Support Portal: You can also directly access the support portal by using the following link. https://personifycorp.zendesk.com/auth/v2/login/normal

NOTE: To assist with learning to navigate our Zendesk Support Portal we have developed a Getting Started Guide. Please reach out to your Account Manager if you would like a copy.

What information should you include in a ticket?

To help with a quick resolution, we ask that you provide a substantive, detailed, and accurate description of the issue you are experiencing. Below is the type of information that should be entered in every ticket you submit.

- Type: Client Support or Cloud Operations
  - Client Support: Product questions, unexpected behavior in product or customization, documentation
  - Cloud Operations: Code deployments, environment refreshes and builds, performance concerns, DBA, and infrastructure support
- Actual result vs. expected result

- If the error is happening with the base product or a customization
- Steps to reproduce
- Environment (e.g., test or production)
- Version and module where the issue is occurring
- Business Impact
- Frequency
- Relevant History, e.g., process changes, patches applied, setup information
- Any information that may be helpful with the resolution of the ticket. E.g., error messages, additional Logs/Stack Traces, screenshots, relevant documentation, if the issue had been reported before, etc.

How do you determine ticket severity and what response time should you expect?

Clients are responsible for determining the initial Priority Level of each ticket you log with us. The Priority Level reflects your assessment of the potential adverse impact to your business and needs to match the Priority Level definitions in this Handbook. If we determine that the Priority Level assigned to your ticket does not align with our definitions, we may re-categorize it to reflect those definitions.

Priority	Description	Initial Response Time
Urgent	Severity 1 – A problem that severely impacts your use of the software in a production environment. The situation halts your business operations, and no procedural workaround exists. Examples of Severity 1 issues are: hosting or application outages, eBusiness is down, loss of production data, or you are unable to perform an operation that impacts the organization's ability to collect revenue.	2 Business Hours or less
High	Severity 2 – A problem where the software is functioning, but your use in a production environment is severely reduced. The situation is causing a high impact on portions of your business operations, and no procedural workaround exists. Examples of Severity 2 issues are: eBusiness slowness, reports that are required for daily business operations are not running as expected, and users cannot perform a standard operation of their job.	4 Business Hours or less

Priority	Description	Initial Response Time
Medium	Severity 3 – A problem that involves partial, non-critical loss of use of the software in a production environment or issues with a development/test environment. For production environments, there is a medium-to-low impact on your business, but your business continues to function, including by using a procedural workaround. For non-production environments, where the situation is causing your project to no longer continue or migrate into production.	6 Business Hours or less
Low	Severity 4 – A general usage question, reporting of a documentation error, or recommendation for a future product enhancement or modification. For production environments, there is a low-to-no impact on your business or the performance or functionality of your system. For non-production environments, there is a medium-to-low impact on your business, but your business continues to function, including by using a procedural workaround.	8 Business Hours or less

What type of communication should you expect on your tickets?

Personify provides updates via ticket comments. These comments will indicate to you the current status of the ticket, the next action items to be taken, and the expected timeframe for such actions. The below outlines the minimum communication standards based on severity. In the event more frequent updates are required, the customer may request them via the ticket.

- Urgent: Every two hours
- High: Every two days
- Medium: Once a week
- Low: Every other week

Under what circumstances are tickets closed?

Tickets are closed under the following circumstances:

- An answer or fix is provided
- You are unresponsive to inquiries from the Personify Support Coordinator for additional information. A ticket will only be closed after two weeks and three attempts.
- The team is unable to reproduce the reported issue after multiple attempts. You and Personify should agree to close the ticket under this circumstance
- The reported issue is a core product defect with medium or low severity level. A defect will be created and sent to the development team. You will be provided a defect number for tracking purposes. Please see the section Defect Resolution Process for more information on defect resolution.
- The request is a fee-based service and not a support issue. You will be notified when this occurs, and the details of the issue will be transferred to your Account Manager or our Professional Services team, as appropriate. See the Fee-Based Services section for more details.

In the event a ticket is closed, and you wish to revisit the issue, you may do so by navigating to the ticket in the support portal, scrolling to the bottom of the ticket and selecting the “create a follow-up” ticket option. Below are the most common reasons for creating a follow-up ticket:

- An error that was not reproducible happens again, and you have additional information to share that will help with debugging the issue.
- You thought an issue was resolved and approved closure, but the ticket was not really resolved.
- A ticket was closed due to non-response, and the client has time to dedicate to the ticket resolution.

Root Cause Analysis

In all cases Client Support strives to understand why a reported issue happened. Whenever possible, we will share our findings with you. There are instances where identification of the root cause of an issue is not feasible. In these instances, Client Support will provide code or procedural workarounds, as appropriate, to avoid or substantially diminish the impact of the issue. In addition, incorrect data created by such issues will be corrected.

Defect Resolution Process

Our Product Development teams are responsible for the development of new features and functionality, as well as resolving issues reported in the base product. We follow a formal process for resolving issues with our base code. The process, which has been developed with customer input over the years, allows us to resolve issues in the most expedient and efficient way possible while delivering quality resolutions across our entire installed customer base.

Our priority is to address Urgent and High severity defects reported for current versions of our software. For Urgent and High severity defects we will provide you status updates via the original ticket where you reported the issue.

Defects that are categorized as Medium or Low are traditionally only corrected in future versions, or releases, of the software. Once the defect is accepted, the support team will provide you a defect number via the ticket.

Fee-Based Services

Fee-based services include any additional service offered by Personify that is not outlined as a Function of Client Support.

Examples of the most common fee-based requests are outlined below.

Professional Services

These requests are fulfilled by our Professional Services team.

- Training
- Changes to existing custom code
- Debugging customizations not developed by Personify Professional Services
- Troubleshooting on-premise environment issues not caused by Personify software
- Request for new functionality or changes to existing functionality
- Support to implement, or configure, base functionality
- Robust support for third-party vendors
- Personify will fix Urgent and High severity defects for our currently supported versions. In the event a fix is required for a lower severity defect, or a product version that has been sunset, the cost to retrofit the fix is billable.

Cloud/Hosting/Infrastructure

Your Agreement lists the specific services provided by Personify. From time to time, you may need additional support or services outside of what is typically provided by the Cloud Operations team. Examples include:

- Temporary environments to support client-specific project/training work
- De-bugging of test environments, if refreshing the environment is not an option
- Deployment of client-specific code

Self-Serve Help

Personify Client Community

We provide a client community, known as The Loop, for all our products. The client community is an excellent way to talk to, and gain knowledge from, your peers. Within The Loop you will find:

- Client discussions
- Product Documentation
- Release notes and product life-cycle policy
- Idea Incubator – a Feedback Portal to submit product roadmap ideas
- Networking opportunities
- Information on upcoming events such as webinars, in-person events, and more!

You can access our client community via the following URL: https://theloop.personifycorp.com.

Online Help

Each of our products has a searchable online help feature.

- ThreeSixty and ThreeSixty YMCA & JCC clients can access updated versions of online help via our client community, The Loop.
- CommUnity clients can access online help from the administrator panel, within the application.

Escalation Process

Customer Escalation Process Overview

If at any point you feel we are not meeting our contractual commitments to your organization, we encourage you to escalate your concerns. To resolve your request expeditiously, it is important you share with the appropriate point of contact all information regarding your issue and any related business impact(s). As part of our continuous improvement process, your escalation will be documented and reviewed to help us determine the steps that led to the escalation and how to prevent future occurrences.

Personify Escalation Points of Contacts

Depending on the origin of your escalation, your point of contact may vary. Below are the most common escalation scenarios and the best point of contact for each. We also encourage you to email/contact your Account Manager at the time of any escalation as they are your strategic partner within Personify and can advocate on your behalf during escalations.

- Account Manager – You can escalate any issue to your Account Manager. They will engage the correct resources at Personify to address your concern.

- Project Related – Escalations related to an open Professional Services engagement should be escalated to your Project Manager. If you require a second level escalation, you can contact your Account Manager, or Susannah Mechem, Director of Professional Services.

- Cloud Operations/Hosting – Escalations related to issues encountered in your production environment should be escalated via a support ticket, notifying the assigned support specialist. If you require a second level escalation, you can contact your Account Manager.

- After-Hours – The Personify support staff is available from Monday-Friday, 8 a.m. to 6 p.m. Eastern. After-hours escalations should be made to **1-866-599-0237**. You should also inform your Account Manager if you have contacted the after-hours hotline.

Feedback

We value your feedback. Your input is used to make improvements to our products and services. Below are some of the ways we collect information from our customers.

Ticket Closure Survey

With each ticket that closes, Personify sends out a ticket-specific survey. Personify asks that you rate your experience with a specific ticket. Personify reviews the feedback from every survey to help us determine how to serve our clients best.

All Client Surveys

Throughout the year, we send surveys to all customers. In these surveys, we ask you to provide honest feedback on our product, support, and services. Positive feedback, as well as areas to improve, are welcome. Your comments, along with those of other customers, help us make ongoing and iterative improvements.

Idea Incubator

The Idea Incubator can be accessed via The Loop, our online community for all Personify customers. The Idea Incubator is where our customers can submit product roadmap ideas. In addition to submitting your ideas, you can also view and vote on the ideas shared by other customers. To make sure each customer has an equal voice, you are allowed five votes. You can elect to put all five votes on a single item or disperse your votes across multiple submissions. Our Product Management team reviews requests in the Idea Incubator and works hard to include features in future product releases whenever possible. Our Product Management team will communicate with you via the portal if your feature is accepted.

Account Managers

Your Personify Account Manager represents your individual needs within Personify. At any time, feel free to reach out to your Account Manager to share information on how Personify is performing for your organization.