

# Support Offering & Policies

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# YELLOWFIN STANDARD MAINTENANCE & SUPPORT OFFERING AND POLICIES

**Payment and Proper Licensing are Required** - Customers may receive Maintenance and Support for Yellowfin software (“Software”) from Yellowfin only if: (a) the relevant Software has been properly licensed by the customer, (b) Yellowfin has been paid current and in full for the applicable Maintenance and Support.

All of Yellowfin’s Support Offerings are subject to change without notice, and not all support offerings are available for all Yellowfin products or regions.

## STANDARD MAINTENANCE & SUPPORT OFFERING

### 1. Support Offering:

Standard Support provides you with the following services:

- **Product Updates** - Updates to currently supported software versions (as outlined in Section 11, figure 2), free-of-license fees, to all parties that have a current paid-up annual Maintenance and Support contract for the Software.
- **Defect Fixes** – Fixes to currently supported software versions (as outlined in Section 11, figure 2) or work-around until the release of a new version of the Software.
- **Unassisted Support** – Access to Yellowfin resources: product Wiki, videos, defined free training services, webinars, knowledge base, and our Yellowfin Community.
- **Assisted Technical Support** – Assisted support through defined support channels, during normal office hours defined by region; i.e. Monday-Friday from 8am-5pm excluding holidays. Support will be provided for trained and licensed Yellowfin users with questions pertaining to general product, product ideas, and application defects within the Software when Yellowfin documentation does not address the behavior of the Software.

### 2. Unassisted & Assisted Support Channel Availability:

Unassisted Support is available 24/7/365 through the following support channels accessed through the Yellowfin website:

- **Yellowfin Community:** on-line collaborative community to post questions, search knowledge base articles, submit tickets, and share product ideas.  
<http://community.yellowfinbi.com>
- **Yellowfin product Wiki:** on-line product version overview for general product features and functionality.  
<http://wiki.yellowfinbi.com>
- **Yellowfin University:** on-line learning center for the latest video trainings, certification programs, and continuous education programs.  
<https://university.yellowfinbi.com>
- **White papers, blog, and downloadable documentation**  
Portal access required for some content  
<http://www.yellowfinbi.com/YFSupportCentre.i4>
- **YouTube channel:** with the latest product tips and how-to’s  
<https://www.youtube.com/user/YellowfinTeam>

Assisted Support is available during Yellowfin’s normal office hours, Monday through Friday, excluding public holidays in Australia, United States, Japan, and the United Kingdom. Staffed hours:

<b>Asia Pacific</b> (Australian Eastern Time)	8am to 5pm
<b>North America</b> (Mountain Time)	8am to 5pm
<b>United Kingdom</b> (British Standard Time)	8am to 5pm
<b>Japan</b> (Japan Standard Time)	9:30am to 5:30pm.



### 3. Support Channels

Yellowfin provides multiple channels for accessing support, these include:

a. **Yellowfin Community:** access from [www.yellowfinbi.com](http://www.yellowfinbi.com) or [community.yellowfinbi.com](http://community.yellowfinbi.com)

Login required to post comments or submit a private ticket.

Customers can log in to the Community and search top trending topics, ask the community questions, post product ideas, and share their expertise with others. Private tickets can be logged via a secure login if your request is sensitive in nature and will be handled by the global Yellowfin Support Desk team. Our technical support consultants will monitor the community and respond to posts and tickets during normal business hours, and in some situations, questions will be converted to a private ticket to be managed by one of our global technical team members.

b. **Yellowfin Customer Portal:** access from [www.yellowfinbi.com](http://www.yellowfinbi.com)

Login required.

Customers can log in to Yellowfin's customer portal and view account details and download content, based on access rights. You will also have access to Yellowfin University, Wiki, Community FAQ & knowledge base, white papers, use cases, and self-guided tutorials based on your account access level.

c. **Email support:** [support@yellowfin.bi](mailto:support@yellowfin.bi)

Emails sent to our main support address will create a Community private ticket. Customers will receive an automated email response that acknowledges their request has been logged in our tracking system, which will alert our global Support Desk team. All assisted support for operational level incidents must be logged through one of our support channels to ensure proper SLA management.

All requests emailed or logged through the Community will be reviewed in the order they are received. Once a ticket has been reviewed and assigned for analysis, the support desk team will determine if: the customer is a current customer, the product version is supportable, and assign an appropriate severity level to the ticket. The customer will receive confirmation from the technical support desk team on the next steps, which in some situations will result in a remote session or a scheduled phone call.

Requests logged outside normal business hours will be reviewed and assigned the following business day.



### 4. Standard Terms

The following terms, workflows, and services shall have the following meanings:

- **Product Issue** means a technical aspect or functionality of the product that doesn't execute or deliver results as described in the product documentation. An issue is recognized as a product defect when it has been reproduced, or sufficient details have been captured, so that an issue can be logged in our Development Management System for review.
- **Product Enhancement** means any customer requested product/process change or idea that is captured and reviewed by the Yellowfin Development team. Our product team will review and define a status for each request to correctly track and provide feedback to our customers. Product ideas or enhancements will be managed in our community to help us gather customer feedback using the four basic statuses below:
- **Ticket** means a single 'private' assisted support request that is logged in our Community system and relates to a specific question or issue within the product. (For example, the use of a specific documented feature of the product or assistance with a specific problem or error message). A single community ticket can involve multiple e-mails, remote sessions, off-line research, and/or scheduled phone calls. This will only be visible to the Yellowfin team, and the ticket requestor, along with any users that were included via the 'share' ticket option.
- **Topic** means a single 'public' assisted support request that is logged in our Community system and relates to a specific 'question', 'idea' or 'problem' within the product. (For example, the use of a specific documented feature of the product or assistance with a specific problem or error message). A single community topic can involve multiple e-mails, remote sessions, off-line research, and/or scheduled phone calls. This topic is visible to all Community users.
- **Ticket Status** is defined in the following ways and refers to workflow steps for capture, validation, escalation, and/or tracking of customer incident(s):
  1. **New** - requests that have been logged in Yellowfin's Community but not assigned to a Technical Support Consultant. The request will be assigned to the next available global team member, during normal business hours, who will review the request, define the severity, and start working towards a resolution.
  2. **In Progress** - defined as a customer ticket that has been assigned to a Technical Support Consultant and is currently being worked on.
  3. **Awaiting Reply** - defined as a customer ticket that has been assigned to a Technical Support Consultant and is now awaiting a response from the end user/requestor. The assigned Technical Support Consultant will resume investigation once response has been received.
  4. **Defect Logged** - defined as a ticket that has been confirmed to be a defect. A defect task will be created in our internal

system and linked to the community ticket. Once the defect has been fixed, the customer will be notified via email which product version the fix will be included within. At this time the request will be moved into a 'Defect Fixed' status. Additionally, all product releases will list all fixed task ID numbers within the change log posted within our Yellowfin Community. [See Change Logs](#).

5. **Defect Fixed** - the defect has been fixed, and customer will be notified which product version the fix will be included within. Additionally, all product releases will list all fixed task ID numbers within the change log posted within our Yellowfin Community. [See Change Logs](#).
  6. **Completed** - defined as any customer ticket that has been processed and confirmed to be resolved to the satisfaction of the customer.
- **Topic Status** is defined in the following ways and refers to workflow steps for capture, validation, escalation, and/or tracking of customer incident(s):
    1. **New** - requests that have been logged in the Yellowfin Community but not assigned to a Technical Support Consultant. The request will be assigned to the next available global team member, during normal business hours, who will review the request, define the severity, and start working towards a resolution.
    2. **In Progress** - defined as a customer topic that has been assigned to a Technical Support Consultant and is currently being worked on.
    3. **Awaiting Reply** - defined as a customer topic that has been assigned to a Technical Support Consultant and is now awaiting on a response from the end user/requestor. The Technical Support Consultant will resume investigation once response has been received.
    4. **Not Planned** - defined as an idea request that has been reviewed, but was not deemed a feasible product/process change.
    5. **Idea Logged** - defined as an idea request that has been initially reviewed, and deemed a feasible product/process change. The request will need to go through a second review with the product team before a final decision can be made. ETA will be mentioned where possible.
    6. **Completed/Resolved/Answered** - defined as any customer topic that has been processed and confirmed to be resolved to the satisfaction of the customer. This could be an answered question or an implemented enhancement.

## ASSISTED SUPPORT WORK FLOWS AND SERVICES

### Assisted Support

Yellowfin will provide Assisted Support to licensed users experiencing product issue(s) during normal business hours. Once a request has been acknowledged, severity will be defined by the Application Support Specialist. Assisted support channels may include the Yellowfin community, emails, remote access, and/or scheduled phone sessions.

### 1. Severity Determination and Escalation

Upon receiving a request, Yellowfin may, at its sole discretion using reasonable efforts, allocate a severity level, a target response time, and a target resolution time for the Issue (as defined below).

Severity Level means the level of business impact on the customer's workflow, and defines the level of urgency that the Yellowfin Support Team will focus on while working towards a resolution. Yellowfin Application Support Specialist will work with the customer to define the severity, but the customer will have the right to request an escalation or de-escalation of the case as needed:

- a. **S1 (System Down):** Complete system outage affecting all users defined as not being able to log into the system. End-user access and workflow has been halted. S1 requests will require customer point of contact to be available for troubleshooting. If the customer point of contact is unavailable to assist with access or troubleshooting assistance, the case will be de-escalated to a S2 level.
- b. **S2 (Work Stoppage):** Workflow issue affecting a minority of users defined as a work stoppage in a given area of the product or stopping end-users from completing critical workflow functions. End-users can work but a solution or workaround needs to be provided to ensure completion of critical workflow.
- c. **S3 (Medium):** Workflow issues that need research or scheduled work to determine problem. No major work stoppage but minor annoyance to user(s) that will be reviewed by the Yellowfin Application Support Specialist. Yellowfin and customer will define and agree a resolution time. Updates will be provided as needed or as requested by customer.
- d. **S4 (Low):** General user questions, scheduled tasks, maintenance, upgrades, non-critical issues, enhancement requests, or documentation issues. These requests are typically closed on first contact, or once the request has been completed. Yellowfin and customer will define and agree upon a resolution time. Updates will be provided as needed or as defined by customer and project scope.





## 2. Response & Resolution

- a. **Response time** means the period of time within the working day, for a given region, from when a customer logs an assisted request to when a Yellowfin Technical Support Consultant acknowledges the request, and a severity is defined. Response times will be based on severity levels as outlined in figure 1.
- b. **Resolution** means that Yellowfin will in good faith use reasonable efforts to resolve the customer request or product issue on a reasonably continuing basis until a resolution is reached, or as agreed to by Yellowfin and the customer. Estimated resolution times are measured, from the acknowledged acceptance of the request by the Yellowfin Application Support team, to when the Software can be used with functionality reasonably consistent with the applicable documentation, and/or in such other applicable manner as is appropriate.

The resolution of an issue can mean one or more of the conclusions below:

- i. Providing a reasonable solution to the customer so that normal workflow is restored.
- ii. Providing a reasonable work-around to the customer so that normal workflow is restored.
- iii. Determination by Yellowfin that the issue is an enhancement request, raising the request to Yellowfin Product Management for future consideration.
- iv. Escalation of a product defect to Yellowfin’s Development team for review. The customer will be updated on the status and next steps as quickly as possible.

Severity	Initial Response Time	Resource Effort	Update Schedule
<b>S1: System Down</b>	8 hours	Level 3 effort until stability is restored	Yellowfin and customer will determine the update schedule.
<b>S2: Work Stoppage</b>	24 hours	Level 2 effort until stability is restored	Yellowfin and customer will determine the update schedule.
<b>S3: Medium</b>	48 hours	Level 2 effort until stability is restored	Yellowfin and customer will determine the update schedule.
<b>S4: Low</b>	72 hours	Level 1 or 2 effort until stability/workaround is restored	Yellowfin and customer will determine the update schedule.



## 3. Initial Response Time Variables

Initial response times are based on the standard business hours within the region the licensee is registered.

Response times can and will be impacted if the customer cannot provide details around product configuration, environmental changes, details about the experienced issue(s), error message(s), or grants remote session access to the Yellowfin Support Desk Team. Yellowfin’s ability to achieve a workable resolution will be adversely impacted if the customer cannot provide the details requested by a member of the Yellowfin Support Desk team.

Customer shall be responsible for contacting Yellowfin to log a request and working with a member of our Support Desk team to determine the severity of the issue. It is the responsibility of the customer to know their IT environment, or have access to people who can assist, including and without limitation to; firewalls, system access, changes in VPN access, database changes, login & password changes, IP address changes, etc.

If Yellowfin support does not receive current system logs, or user does not have access to the needed system details to start the troubleshooting process, the estimated resolution time will be extended until logs or access can be granted.



## 4. Assisted Support Exclusions

- a. **Environmental Issues:** Yellowfin is not responsible for any hardware, cabling or operating system components of the network configuration, or for customer’s operation of workstation equipment. The customer is responsible for all systems and networks to be set up to meet Yellowfin specifications.
- b. **Unexpected Behavior:** that can be isolated to a user’s specific configuration or environment does not constitute a product defect. Yellowfin’s Support Desk can provide troubleshooting suggestions for unexpected behavior in these cases. However, Yellowfin is not responsible for the resolution of any such behavior.
- c. **Non-standard Customization or Integration of Software is Not Part of Maintenance and Support:** Any requests to perform customization, installation, or integration work outside standard how-to questions as defined within the documentation provided with the user’s licensed software version are not included in Maintenance and Support, but are available to the customer as paid for customized professional consulting services, and should be addressed and set forth in a separate applicable services agreement. The Support Desk can provide troubleshooting suggestions for unexpected behavior in these cases. However, Yellowfin Support is not responsible for the resolution of any such behavior.

- d. **Unauthorized Customization or Integrations:** Yellowfin will not support any customer that makes modifications to the Yellowfin software code base, or uses custom integration solutions other than the documented Yellowfin APIs.



## 5. Support Requirements & Guidelines

- a. For a confirmed licensed customer(s) to receive support from Yellowfin, with regards to any reported error(s) or other problem(s), Yellowfin must first receive a documented replicable example of the defect or error, and if requested by Yellowfin, a listing of output logs or other information that Yellowfin requires in order to reproduce working conditions similar to those present when any defect(s) or error(s) in the Software were discovered.
- b. Under no circumstances are you to provide any confidential, or protected data, to Yellowfin when seeking support assistance via email or remote support, including proprietary business information, protected technical data, private and/or personally identifiable information, or any other form of confidential, private, personal or other protected information unless both parties have agreed, in writing, to do so.
- c. Remote system access, by any member of Yellowfin, must be approved and monitored by the Customer point of contact, with any subsequent system changes to be performed by the Customer point of contact. Yellowfin recommends that any system access granted to Yellowfin should be a non-production environment; for example, a development environment that has any and all sensitive data removed, as outlined in section (b) above. Yellowfin will not be held liable for any issues or problems caused during a remote access session.



## 6. Support Obligations: Direct Customers and Reseller Clients

- a. Must Provide Yellowfin Technical Support Desk team with:
  - i. Contact information; name, email, company name, and license validation
  - ii. General product questions or documented example of errors or defects; and,
  - iii. If requested by Yellowfin, provide output files and any other data, which Yellowfin requires in order to reproduce operating conditions similar to those present when any defect or errors in the Software might be detected, to help discover, validate, and diagnose problems.
- b. Support Desk personnel shall be the sole conduits of communication with the end-user regarding the open request unless previously agreed upon by both partners.



## 7. Support Obligations: Resellers, Software Vendors, Distributors, or Managed Service Provider

In order to receive effective Level 2 support from Yellowfin, Partners (including Support Obligations: Resellers, Software Vendors, Distributors, or Managed Service Provider) are expected to provide first level technical support to their licensed End Users by their Yellowfin trained personnel. This will include obligations to:

- a. Provide 'How to' support to end users, including
  - i. Answer product questions
  - ii. Research support issues in Licensor Community, Wiki, Resources, etc.
  - iii. Validate and diagnose problems
  - iv. Work with End User to ensure reported errors are reproducible
  - v. Recommend workarounds where possible
  - iv. Rule out environment, integration, and external system(s) issues
- b. Promptly escalate any unresolved issues with the software to the Yellowfin Technical Support Desk team via the defined channels outlined above.
- c. Provide a comprehensive brief to Yellowfin consisting of:
  - i. Documented example of the defect or error; and,
  - ii. If requested by Yellowfin, provide a listing of output and any other data file or logs, which Yellowfin requires in order to reproduce operating conditions similar to those present when any defect or error in the Software was discovered, validate and diagnose problems.
- d. Yellowfin support personnel shall be the sole conduits of communication with partner regarding the open case unless previously agreed upon by both partners.
- e. Yellowfin will only accept queries and defect/error requests from designated First or Second Level partner support contact(s).



## 8. Release Management

We aim to release frequent updates to Yellowfin in order to:

- Address any quality issues in a timely manner
- Deliver new product features and improvements

### a. Product Release Numbering

Yellowfin uses a three-place numbering schema to designate released versions for its major (XX.), minor (.YY), and patches (.ZZ) for software product management. Patches will be released as needed and under our agile development process. As an example, releases will use the below number format:

- Major release = “8.0”
- Minor release = “8.1”
- Patched release = “8.1.1”

### b. Feature Releases

Yellowfin aims to release a major upgrade every 18 to 24 months, as well as quarterly minor releases. These releases will contain a blend of new functionality and planned product fixes. All product change logs and release notes can be found within the [Yellowfin Community](#).

Yellowfin may change to a new major version number to indicate a major schema change. Feature releases may not be API-compatible with the previous release. Yellowfin recommends that customers test web services, and any custom integration processes, before running a newer version of a Yellowfin software update in a production environment. It is always recommended that you create backups before any upgrades are performed and that you have spent the time to test all new versions within your test environment(s).

### c. Patch Releases

Yellowfin patch releases are scheduled as needed, unless not practical or otherwise defined, depending on the number and urgency and impact of defects that have been fixed during a particular development cycle. We aim to minimize the time between a defect being reported, and a fix being available. Patch releases are numbered using the YY.XX.ZZ format outlined above, i.e. 7.4.1

We don't expect all customers to upgrade Yellowfin every release, however system administrators should keep current on all release change log notes to keep apprised of key system enhancements, defect fixes, and security updates. (Located here - <https://community.yellowfinbi.com/knowledge-base/articles/change-logs>). Yellowfin recommend that system administrators plan to upgrade Yellowfin and related components on a regular basis (at least annually) to ensure software currency.

Sometimes, a security issue or serious application bug will arise that we feel is in everyone's best interest to fix as soon as possible. In such cases, we will recommend in the Release Notes, that all customers upgrade to the latest version. It is the end-user's responsibility to ensure that designated personnel monitor Release Notes to ensure awareness of such security issues and/or serious application bugs.

### d. Beta Releases

Occasionally and when possible, we will release “Beta releases” of the next major Yellowfin software product version. How often and when we do so depends on the current development cycle. Beta releases will be announced on the website Support page, within the Community, and to the Yellowfin-developer mailing list. Beta releases are published for testing integration and early feedback about our work, under no circumstances should the beta release be used as a production release. Yellowfin will not provide any level of troubleshooting or updates outside planned scheduled beta updates.



## 9. End Of Life Schedule

To continually provide our customers with the highest quality and most cost effective solutions, Yellowfin will retire older product versions. This allows us to focus more resources on enhancing current versions that support the latest technological innovations. Ultimately, this enables us to provide our customers and partners with the best BI toolsets so you can grow your business. The reasons that drive these changes, include:

- a. Technical advances in computing and networking may mean that maintaining an old application, in an evolving network environment may become cost prohibitive, and
- b. By committing time and resources to older versions our ability to provide our partners with the latest technology solutions is impacted. Additionally, newer products will include fixes and/or enhanced functionality that allow for greater return on your investment.

Customers and partners requesting support on unsupported Yellowfin versions will be asked to upgrade to the current release before any extensive work will be performed on their product issue. Staying current ensures that your end-users have the latest enhancements and fixes.



## 10. End Of Life Product Schema Details

Supported product versions will be announced within the Yellowfin Community, Proactive Alerts, updates to this document, Customer Success Manager communication, and Release Notes for the affected products.

Product Status	Version	Estimated End of Life
Unsupported	Older than 7.2	EOL
Supported	7.3	June 2019
Supported	7.4	June 2020
Supported	8.0	TBD





## 11. Language Support

Yellowfin will support the following eight (8) languages across major (XX.) and minor (.YY) product releases. Other languages that have been translated by our partners may be found in our Marketplace.

Yellowfin encourages, and enables, our partners to add additional language packs to our Marketplace, but Yellowfin will not support any languages outside the eight (8) languages outlined below.

All major (XX.) and minor (YY.) product releases will be released with English as the core language. The below eight (8) supported languages will be updated for major (XX.) and most minor (.YY) general release versions. Language updates will not be included for end-of-month updates, beta versions, and/or some minor (.YY) release candidates.

Language Support	7 Series
English	✓
Spanish	✓
French	✓
Japanese	✓
Chinese Simplified	✓
German	✓
Brazilian Portuguese	✓
Italian	✓



## 12. Accessibility

Yellowfin is committed to providing access to its software for people with a disability, defined under the US Governmental Legislation Section 508 Amendment to the Rehabilitation Act of 1973, which reinforces best practices that we encourage all organizations to follow. We proactively educate our product teams about accessible design and the Section 508 Access Board standards. We make sure to partner with companies who also hold our same company beliefs; ensuring that our partners and their end-users can take full advantage of the wonderful tools built into today's web based browsers that power the Yellowfin solution. You can review the latest VPAT product audit for Yellowfin here, <https://community.yellowfinbi.com/knowledge-base/article/yellowfinbi-voluntary-product-accessibility-template-vpat> - or go to our [Community](#) and search VPAT.



For more information on Yellowfin, visit [www.yellowfinbi.com](http://www.yellowfinbi.com)