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**Policy:** The Company shall offer a complete range of support services to all customers who purchase Company-developed software, as well as to in-house users of Company-developed software.

**Purpose:** To ensure that customers can effectively install and operate the software they purchase from the company and to provide help for customers who have questions about or problems with the software they purchase from the company.

**Scope:** All software products and updates released by the Company.

**Responsibilities:**

The Product Manager is responsible for reviewing customer suggestions and determining which, if any, suggestions will be implemented.

Software Support Analysts are responsible for working with customers until their problems are resolved, surveying customers for feedback, and maintaining the software support database.

Software Trainers are responsible for developing training materials and provides training classes and instruction for customers.

Customer Consultants are responsible for developing custom solutions.

**Definitions:** Service Level Agreement (SLA) – A binding contract, formally specifying or quantifying a customer’s expectations with regard to solutions and tolerances; a collection of service level requirements, negotiated and mutually agreed upon by the service provider and the consumer.

**Procedure:**

### 1.0 SOFTWARE SUPPORT OVERVIEW

To encourage customers to use their software to its full potential, the Company shall offer a full range of support services. Three general types of support services are:

* Emergency phone or email support;
* Customer training; and
* Customer consulting.

The Company may enter into a service level agreement (SLA) with individual customers, tailoring the agreement to each customer’s requirements.

### 2.0 SOFTWARE SUPPORT SERVICES MANAGEMENT

* 1. To organize and manage support services, the software support department maintains a software support database of all support calls and support information. The table on the following page shows the type of information the software support database tracks.
  2. On a rotating basis, members of the technical staff (Systems Analysts, Software Designers, and Programmers) help Software Support Analysts deal with complex problems.

# Software Support Database

| **Section** | **Description** | **Information Tracked** |
| --- | --- | --- |
| Phone calls | Records of software support calls |  Customer name   Time and date of call   Name of software support analyst   Product name and version number   Description of the problem   Problem status   Problem resolution |
| Problem reports | Software bugs identified by customers or internal people |  Name of the person who reported the problem   Product name and version number   Description of problem   Date the problem was reported   Status of the problem (open, corrected, on hold, and so on)   Description of the problem’s solution (reference the associated design document)   Date the problem was corrected   Version number of the release in which the problem is fixed   List of the software components affected by the fix   Names of all people who worked to correct the problem |
| Enhancement requests | Requests from customers to add features and functions to existing software products | The same type of information as for problem reports |
| Training courses | Information about the software training courses the company offers |  Course name   Course description   Course outline   Course schedule   Names of qualified instructors   Equipment required   Suitable locations   Recommended class size |
| Course evaluations | Evaluation forms that students complete for each training class they attend |  Course name   Class date   Student’s evaluation of the course content, materials, and instructor |

* 1. On a monthly basis, Software Support Analysts contact randomly selected customers and survey them about the quality of the support they are receiving.
  2. The Product Manager, Software Support Analysts, Client Consultants, and Software Trainers review customers’ suggestions. This group determines which, if any, of the suggestions will be implemented.

### 3.0 FREE BASIC SOFTWARE SUPPORT SERVICES

3.1 The Company shall include the following documentation with each software product purchased:

* A self-guided tutorial;
* A user guide;
* An installation and implementation guide; and
* An annual newsletter.

3.2 The company provides e-mail, a website, and a telephone hotline for customers to call for software support.

3.3 Customers receive free support time for the first thirty days after the purchase date. Customers who need support after the first thirty days may pay an hourly usage fee or purchase an extended support agreement.

### 4.0 EXTENDED SOFTWARE SUPPORT SERVICES

4.1 Customers who need more than the basic support services may purchase the following additional services:

* Training classes (see ITSW112 SOFTWARE TRAINING);
* Unlimited phone support via a toll-free (“1-800”) number;
* Newsletters that include articles, technical tips, product release information, class schedules, and company news;
* Implementation consulting (i.e., expert on-site help installing and implementing the software);
* Access to the company’s internal experts, such as the software designer and systems analyst (which service may be particularly useful to advanced users, resellers, and business partners);
* Software customizations; and
* Access to internal system specifications or source code, for customers wanting to program their own software customizations. (Note: customers who purchase source code must either pay for support services on an hourly basis, or waive the right to purchase any support services.)

4.2 The Company sells support services both individually and packaged in groups, under the terms of an extended support agreement.

4.3 Purchasers of extended support agreements pay an annual fee to receive a specific set of support services. There are several levels of support agreements; the more expensive the agreement, the more services provide. To encourage customers to purchase extended support agreements, each agreement includes with it additional services or free items that are only available to agreement purchasers. For example, a typical extended support agreement includes:

* Free, unlimited phone support via a toll-free number;
* One introductory training class;
* Free product updates;
* Advance notice of product updates;
* Access to internal experts; and
* Quarterly newsletters.

### 5.0 USER GROUP SOFTWARE SUPPORT

5.1 The Company shall encourage customers to form regional product user groups, to allow customers to discuss problems and share solutions with each other.

5.2 The company provides user groups with:

* Advance notice of product releases and development plans; and
* Access to internal experts, who give presentations and product reviews.

### 6.0 PHONE/E-MAIL SOFTWARE SUPPORT SERVICES

Software support calls provide an opportunity to convey a positive company image to customers who are struggling with technical problems. Efficient, professional phone and email support is essential to good customer relations.

6.1 Assign Calls To Analysts

The software support department uses a phone call routing system to assign calls to Software Support Analysts on a first come, first served basis. The software support analyst enters each call into the phone calls section of the software support database. The analyst uses this database to track information about the call.

6.2 Determine The Nature Of The Call

The Software Support Analyst works with the customer until the customer’s problem is resolved. In some cases, an analyst might need to consult someone more familiar or better qualified to handle the problem. However, the original analyst must still follow up with the customer and make sure that the customer is satisfied with the resolution of the problem.

Customer calls typically fall into one of the categories listed in the following table. For each call, the software support analyst performs the action described.

|  |  |  |
| --- | --- | --- |
| **Type of Call** | **Category** | **Action** |
| Request for help. | The customer made a mistake or needs help completing a task. | Help the customer figure out the cause of the problem and how to solve it. |
| Software problem report. | The customer has identified an error or deficiency in the software. | Enter the error into the problem reportssection of the software support database. Refer to the phone call record in the description of the problem. |
| Request for enhancements. | The customer wants the software to perform in a way other than that in which it was designed. | Enter the enhancement into the enhancement requests section of the software support database. Refer to the phone call record in the description of the problem. |

**Forms:**

* None.

**References:**

* 1. **ISO/IEC 12207:2008 – SYSTEMS AND SOFTWARE ENGINEERING – SOFTWARE LIFE CYCLE PROCESSES**
  2. **IEEE 12207-2008 – SYSTEMS AND SOFTWARE ENGINEERING – SOFTWARE LIFE CYCLE PROCESSES**

This ISO standard describes the major component processes of a complete software life cycle and the high-level relations that govern their interaction. It establishes a software life cycle architecture based on two principles, modularity of processes and responsibility for processes. There are three process classes in the ISO software life cycle: primary (such as acquisition and operations); supporting (such as documentation and configuration management); and organizational (such as infrastructure and training). Each life cycle process is made up of activities and each activity is further subdivided into tasks.

The IEEE version of 12207 is more closely aligned with the ISO standard than it was in previous versions.

For more information, visit the ISO web site at <http://www.iso.org/iso/catalogue_detail.htm?csnumber=43447> or the IEEE web site at <http://standards.ieee.org/findstds/standard/12207-2008.html>.

**Additional Resources:**

A. ITTS102 IT SUPPORT CENTER.

**Revision History:**

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| --- | --- | --- | --- |
| **Revision** | **Date** | **Description of Changes** | **Requested By** |
| 0 | mm/dd/yyyy | Initial Release |  |
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