

SS&C Advent Maintenance Services Guide

Maintenance Services

SS&C Advent Maintenance Services consists of a community of people, systems and services designed to deliver high quality support and the latest software upgrades.

The level of support you need depends on your business requirements, complexity of your operations, your technical expertise and other factors unique to your firm. That's why SS&C Advent Maintenance Services is flexible, modular and built upon these fundamental services:

- Direct access to support experts
- Rapid response time targets
- Access to Advent Community
- Software upgrades
- 24/7 Concierge Service

The **Pinnacle Maintenance Plan** is SS&C Advent's all-inclusive plan with the following unique features:

- Fastest access to support experts
- Unlimited support hours maximum support coverage
- 24/7 access to support for critical issues

Built for You

No two firms have the exact same requirements for support and services, yet all firms want flexibility and choices. The maintenance plan offerings are based on what you view as important—maximum protection against system downtime, with the responsiveness and flexibility to decide which plan fits your needs.

Plus Plan

The Plus maintenance plan is designed for organizations with steady business activity year-round, simple workflow processes and an experienced, stable workforce. The Plus plan includes the following features:

- Access to SS&C Advent's issue tracking database to view product enhancements
- Eligibility to participate in the early adopter program for your SS&C Advent products*
- Access to discussion boards on SS&C Advent Community

Preferred Plan

The Preferred maintenance plan is most appropriate for companies whose investment operations are evolving or customer requirements are changing, and there is a need to refine internal operations. The Preferred plan includes the following features:

- Faster access to support experts
- Greater support availability
- Increased support usage allotted per year

Pinnacle Plan

The Pinnacle maintenance plan is for firms with demanding business environments and rapidly changing needs. The Pinnacle plan is our most comprehensive, responsive service plan and includes the following features:

- Fastest access to support experts
- Unlimited support hours and maximum support coverage
- 24/7 access to support for critical, severity 1 issues

* Participants in early adopter programs are selected at SS&C Advent's discretion.

SS&C Advent Maintenance Services At-A-Glance

Good: ○ Better: ◐ Best: ●

Service Levels	Plus	Preferred	Pinnacle ²
Access and Response	12	20	Unlimited
Hours of Support (per year, per product) ¹	●	●	●
Access to Concierge Service	●	●	●
Access to Issue Tracking Database	○	◐	●
Service Level Objectives		◐	●
Priority Queuing			●
24/7 Support for Critical Issues ³			
Advent Community			
Discussion Boards	●	●	●
Online Training Paths	●	●	●
Knowledge Base Access	●	●	●
Webinars	●	●	●
Product Enhancements			
Eligible for Early Adopter Program	●	●	●
Electronic Software Delivery	●	●	●
Strategic Services			
Americas (ET)	9am–6pm	8am–7pm	8am–8pm
APAC (SGT)	7am–4pm	6am–5pm	6am–6pm
MENA (GST)	9am–6pm	8am–7pm	8am–8pm
Europe (BST/GMT)	8am–5pm	7am–6pm	7am–7pm

1. Total Support Hours (per year) is the sum of all work on cases initiated with SS&C Advent. In addition, a cap of 30% of the total hours is applied to cases created from the phone.

2. Not all maintenance plans are offered for all products.

3. Immediate access to support for critical issues is 24/7 or 24/5 depending on product and geography.

Help Us Help You

Rely on SS&C Advent Community to access peers, tools and other resources

Create power users within your firm to streamline your service requests

Submit an online support request for quickest access to support experts

Tell us how we are doing and complete a short survey

Closer Look at Maintenance Services

Support Experts

We want to help answer your product questions. You can access support expertise and other professionals using the products on SS&C Advent Community. Please see the following page for more information about working with SS&C Advent's support resources.

SS&C Advent Community

SS&C Advent Community is the fastest way to connect with the expert best suited to assist you. When you have non-urgent issues or need assistance after your business hours, Community is your primary resource.

In addition to submitting and managing online support requests, SS&C Advent Community provides you a variety of ways to get the most from your SS&C Advent solution—including:

- Connect with your peers to learn best practices on non-product specific discussions
- Leverage self-help tools like the Knowledge Base to search across products and Discussion Boards to find and share solutions with SS&C Advent clients around the world
- Establish your learning path to get up and running quickly on new features and to gain in-depth product knowledge
- Download software upgrades included in your maintenance plan by visiting SS&C Advent's Download Center

Furthermore, Community provides you a view into our issue tracking database to search for information about product fixes and requests. Information is updated daily to provide you with the latest information from SS&C Advent's development and support teams.

Telephone Support

For pressing, urgent issues, rely on telephone support. As a best practice, consider designating named contacts within your firm, who have received product training, to contact SS&C Advent's support team.

SS&C Advent's support team helps with advanced technical troubleshooting but does not perform the functions of a System Administrator. Similarly, while we help with specific product-related questions and issues, it is your responsibility to have your staff trained.

24/7 Support for Critical Issues

The Pinnacle plan includes immediate access to SS&C Advent's support team 24 hours a day/7 days a week for critical, severity 1 issues involving Axys,[®] APX, Geneva[®] and Moxy[®] products. And for Tamale,[®] the Pinnacle plan includes 24/5 access to SS&C Advent's support team. This service connects you with a support expert who uses reasonable efforts to resolve your critical issue as soon as possible. Preferred and Plus plan recipients as well as all other SS&C Advent products have access to SS&C Advent's support team during local support hours for all severity levels.

First Stop: SS&C Advent Community

The Community is the largest pool of SS&C Advent and Investment Management knowledge. You have direct access to SS&C Advent employees, partners and your peers to get questions answered, learn best practices and share solutions. Make SS&C Advent Community your first stop.

Severity Levels

SS&C Advent support is committed to ensuring that your issue receives the appropriate level of support and that a timely response is provided based on the severity of the issue. You can state the severity of your issue when submitting an online support request or work with a support expert to determine the level of severity that best matches your issue. Severity levels may be adjusted or changed once troubleshooting begins, or when an interim, feasible solution is identified. Please note that it's important to set the appropriate level of severity by using the definitions in the table below.

Severity Level	Description	Actions
1 (Critical)	Case needs immediate action. The system is rendered unusable and prevents you from conducting your business. Operations are halted and impacted in an immediate, material way.	Support team works with lead experts and you, using reasonable efforts to resolve as soon as possible. Will work 24/7 in conjunction with your staff. Notifies senior management of escalation
2 (High)	Incorrect results prevent you from operating normally or major function is rendered unusable. Operations are negatively and/or materially impacted.	Support team will obtain solution or interim workaround.
3 (Medium)	Applies to the majority of cases. Non-critical issue or inefficiency with software. Minimal impact on operations.	Support team will provide regular updates until the issue is resolved.
4 (Low)	Case is not time-sensitive—i.e. new feature, enhancement or annoyance issue. No material impact on the business.	Support team will work with you to find workaround or request change/new feature.

Severity Level 1

Our goal is to minimize downtime. If you encounter a critical, severity 1 issue then it's all hands on deck. For example, if Moxy® is completely down, users are unable to login and it's an hour before markets open then it's considered an urgent issue. Or if a Geneva® server crashes and you're unable to restore files or start the service manager then that's also treated as a severity 1 issue. Critical issues get our immediate attention.

Priority Queuing

If you're on the Preferred or Pinnacle plan, your support calls are given priority in the telephone queue so you get faster access to support experts. Pinnacle plan calls are prioritized before Preferred plan calls and Preferred plan calls before Plus plan calls.

Service Level Objectives

Service level objectives are targets reflecting the percent of support interactions responded to within a certain time period, whether initiated by the web or online. Below illustrates response targets across the maintenance plans.

Concierge Service

Our Concierge Service is available 24 hours a day/7 days a week. You can access the concierge team through your support number by pressing the number 0 or by email to concierge@advent.com. Concierge Service is included in each maintenance plan and provides personalized service to address ad hoc inquiries such as logging onto Data Exchange, logging into and navigating SS&C Advent tools like SS&C Advent Community and the Advent Custodial Data Dashboard or retrieving product installation codes.

Response Times

Contact Mode	Pinnacle Plan	Preferred Plan	Plus Plan
Submitted online	90% within 1 hour	90% within 2 hours	90% within 3 hours
Submitted by phone	90% within 3 minutes	90% within 4 minutes	90% within 6 minutes

Early Adopter Program

If your firm would like to be involved in SS&C Advent's product planning then consider our early adopter program. This program places you first in line to implement new product releases and establishes direct communications with our development team. If you would like to be considered for as a participant in an SS&C Advent early adopter program, please communicate your interest to your SS&C Advent Relationship Manager, Project Manager or Sales Representative. Interested parties will be reviewed by SS&C Advent to determine suitability for participation.

SS&C Deliver Consulting Services Sessions

SS&C Deliver is our annual user conference where we bring together people from across the industry to learn, share and grow together in a relaxed, informal atmosphere. At this event, we offer dedicated services sessions where you and your peers, for example, can share best practices for a product migration.

Concierge Service

Our concierge service is focused on addressing your ad hoc, non-technical inquiries and is available 24 hours a day, 7 days a week.

SS&C Advent's Product Support Lifecycle

SS&C Advent provides support for its product versions according to the [SS&C Advent Product Support Lifecycle](#) published on SS&C Advent Community.

ABOUT SS&C ADVENT

SS&C Advent helps over 4,300 investment firms in more than 50 countries—from established global institutions to small start-up practices—to grow their businesses, minimize risk, and thrive. We have been delivering unparalleled precision and ahead-of-the-curve solutions for more than 30 years, working together with our clients to help shape the future of investment management. Find out how you can take advantage of our industry-leading solutions to support your business goals. To learn more about the right solutions and services for you, contact advent@sscinc.com. For more information contact your SS&C Advent representative or email sales@advent.com.

©2021 SS&C Technologies Holdings, Inc.

This communication is provided by SS&C Advent for informational purposes only and should not be construed as or relied on in lieu of, and does not constitute, legal advice on any matter whatsoever discussed herein. SS&C Advent shall have no liability in connection with this communication or any reliance thereon.



advent.com | info@advent.com