OpenText Cloud

Customer Success Services Handbook
Signature Subscription

1 Introduction

Welcome to Open Text Corporation's OpenText (OT) Customer Success Services Handbook. This OpenText Customer Success Services Handbook (the "Handbook") provides you with information about the policies and processes designed with your support needs in mind and describes the Customer Success Services offered by OT for Cloud based solutions. Please use this as a guide to help you get the most out of your investment in OT solutions.

You can also refer to http://www.opentext.com/support to find more information or contact your local OT Customer Success Services. Except as specifically outlined in this Handbook, the terms of the customer's Cloud Services Agreement shall apply to the OT Customer Success Services and any additional programs purchased by the Customer. Capitalized terms used in this Handbook but not defined have the meanings given them in the applicable Cloud Services Agreement.

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2 Glossary of Terms

Authorized Change Contact	One or more of your designated employees who are authorized business points of contact for modifications to the Cloud Services. Authorized Change Contacts have authorization to approve Change Requests, or Statements of Work in relation to your Cloud solution in accordance with your Cloud Services Agreement. Authorized Change Contacts may or may not be the same contacts designated as POCs
Business Hours	The Technical Success Services (TSS) team will provide coverage for all contracted services from 8 AM to 5 PM, Monday to Friday, during customer working hours. Support will be offered based on the primary customer time zone specified in the Cloud Services Agreement.
"Classification", "Classified" or "Classify"	The OT designated priority of the Support or Service Request.
Cloud Services	The products and services offered by OT that you ordered, and OT makes available to you from the Cloud, as described in a Cloud Services Agreement.
Cloud Services Agreement	The agreement that governs the provision of Cloud Services by OT to you.
Customer Release	A Customer provided package that contains one or more functional changes to the Customer Configuration, i.e., changes to Functional Enhancements and/or product configurations.
Customer Configuration	Means the collection of product configurations, any Functional Enhancements, integrations, and approved third-party software components, included within the Cloud Services, and used by Authorized Users to achieve a specific purpose, or to carry out specific tasks.
Custom Build Deployment	Any type of custom enhancements or changes, including Custom Integrations and/or Functional Enhancements that are bundled together in a package and/or release to be used and deployed within the standard Cloud Service.

Custom Integration	Means an integration of the Cloud Services with a Customer-provided business solution that falls outside of the standard included product functionality (for example, another application on Customer's premise or a third-party cloud service contracted by Customer).
Customer Service Portal	Refers to the OT online access point for links to and information regarding OT Success Service. The portal is used by Customers to log Service Tickets and access the self-service knowledge base.
Customer Success Service(s) or CSS or Success Service(s)	Means the program of support services provided as part of the Cloud Services engagement
Functional Enhancement	An extension to the functionality of the Cloud Services through the addition of customizations or Custom Integrations, custom interfaces, or third-party products.
Go-Live	Point in time where the Cloud Services is available for production use by Authorized Users.
Incident	An issue that adversely impacts the quality of the Cloud Service, preventing or hindering Authorized Users from carrying out a normal business function.
Incident Management	Means the management lifecycle process of all Incidents. The primary objective is to restore normal service related to the Cloud Service as quickly as possible.
Level 1 Support	Customer Service Desk function providing general support and troubleshooting, e.g., password resets, help with printer configurations, workarounds for known issues, etc. Also responsible for triaging and routing tickets and escalation to Level 2 and Level 3 Support functions.
Level 2 Support	Provided by trained Customer application administrators, responsible for fulfilling Service Requests and troubleshooting and resolving known issues. Also responsible for triaging and routing tickets and escalation to Level 3 Support functions.
Level 3 Support	Provided by OT personnel, responsible for fulfilling Service Requests where required access is restricted to OT personnel and for addressing issues that cannot be resolved by either Level 1 or Level 2 Support functions.

OT Cloud/Cloud	The cloud infrastructure provided by OT under this Agreement (which may comprise of OT infrastructure, third party infrastructure, or a combination of both)
Service Level Agreement or SLA	The service levels to be provided by OT to you in accordance with definitions, procedures, and schedules as they are defined in the Cloud Services Agreement.
Points of Contact or POC	Refers to one or more representatives designated by Customer who are authorized to contact OT under the Cloud Services Agreement.
Onboarding	The process of provisioning and configuring the agreed Cloud Services in the OT Cloud.
Problem	A request to establish the root cause of a Critical Incident and recommend corrective actions to prevent recurrence, or for OT to investigate and resolve a potential product defect
Problem Management	Means the process to manage the lifecycle of all Problems, having a primary objective to prevent new Incidents with the same cause as a previous Incident from occurring
Production	Means the post Go-Live use of the Cloud Services.
Recovery Point Objective (RPO)	The amount of Content (measured in time) that may be lost if a catastrophic event occurs to the Cloud Services.
Recovery Time Objective (RTO)	The elapsed time between declaration of a catastrophic event by OT and the point in time at which Production instance is restored

Request Catalogue	Documents a list of Service Requests that can be performed by the Customer through a self-service administrative user interface, and requests that can be raised by the Customer for OT to perform should elevated access rights be required.
Response Time	The period of time between a Service Ticket being received by OT and the time OT responds to Customer for the purpose of commencing work necessary to action the Service Ticket.
Restore or Restoration	Means action to return the Cloud Services to operation after repair or recovery from an Incident. For example, applying a workaround.
Restoration Time	The time elapsed between when a Service Ticket or Incident is logged with OT and the Cloud Service is restored to normal operational levels.
Service Request	Request for something to be provided or modified such as a request for information, 'how-to' type assistance for an Authorized User, or a request to execute application administration tasks on behalf of Customer.
Service Ticket	The initiation of a record or "ticket" documenting the details of the Service Request or Incident.

3 Onboarding

During the Onboarding phase, the Onboarding manager will work with the Customer to plan and implement Onboarding. The Onboarding manager will be the Customer's main point of contact within OT during this phase.

Customer and OT shall cooperate in good faith to complete the Onboarding in a timely and professional manner. Customer acknowledges that failure to adhere to schedules or complete tasks within Customer's control may delay completion of the Onboarding.

In addition to provisioning the Cloud Services, Onboarding will provide:

- A communication plan, including listing key contact details for both parties and service reporting cycles.

- Information about raising Service Tickets and Change Requests.

3.1 Migration of Existing Customer applications and Content

Activities to migrate existing Customer application(s) and/or Customer Content to the OT Cloud, if required, will be considered Additional Services outside the scope of the Cloud Services Onboarding.

3.2 Service Access and Go-Live

Upon completion of the initial activation of the Cloud Services, OT will inform the Customer that the Cloud Services are available to access ("**Access Enabled**"). Once Access Enabled, many Cloud Services can be used, but in some cases, Customer may elect to further configure the Cloud Services to their specific use cases. In such cases, once this work is completed and accepted by OT into the Cloud Services, the Cloud Services are handed off to the Customer before Go Live ("**Service Hand Off**"). After the Cloud Services have been Access Enabled and have achieved Service Hand Off (if applicable), the Customer and OT can then coordinate and plan for the Customer Go-Live

4 Technical Success Services (TSS)

4.1 Service Hours and Location Information

Technical Success Services (TSS) provides support during standard business hours, Monday through Friday (5x8), excluding Public Holidays in the Customer Support Region, for all non-critical service tickets. The hours of service shall be based on a single OT support region as documented in your Cloud Services Agreement.

Where an alternative support location is used by OT, regional statutory holidays for such alternative support location shall not impact the Technical Success Services hours for the Customer.

- Priority 2 (High), Priority 3 (Medium), and Priority 4 (Low) tickets are supported during these business hours.

- Priority 1 (Critical) tickets are handled through 24x7 on-call support, including weekends and holidays, in accordance with OpenText's incident severity classification (Section 4.4.4).

Communication relating to an "Service Ticket" will be made in English, unless, at OT's discretion, the support centre responsible for processing is able to offer communication in another language as a

convenience to the Customer. OT may not be able to provide any information in a language other than English in the event a Service Ticket is transferred to a different support location.

4.2 Point(s) of Contact

Customers are required to provide OT with named Points of Contact, who are responsible for logging Service Tickets on behalf of the Customer. Unless otherwise agreed in a Cloud Services Agreement, a maximum of three POCs may be named for the Cloud Services. One person must be nominated as the Customer's primary POC, and this person will be responsible for administering access for all other Customer POCs in the Customer Services Portal.

POCs must be knowledgeable about the Cloud Services and associated programs to help resolve issues and to assist OT in analysing and resolving Service Requests. POCs must be available to actively participate with OT on diagnosis and testing. OT reserves the right to suspend its obligations when a competent POC is unavailable for such participation. POCs will be given training during Onboarding to ensure they know how to raise Service Tickets, including what level of information is required to avoid unnecessary delays in OT's handling of such requests.

Customer and its POCs have the following additional obligations:

- Provide OT with the information it reasonably needs to classify and log the Service Ticket, and wherever possible, use the Service Ticket number for each communication with OT.
- Ensure that all applicable client-side or related software that the Customer downloads or uses in conjunction with the Cloud Services is up to date and compatible with the Cloud Services.
- Customers must also keep a record of client-side or related software in the Customer Service Portal at all times. This may include, but is not limited to, information related to client-side operating systems, browser technologies, integrations, etc.

4.3 Technical Roles & Responsibilities

Technical Success Managers (TSM) -

The Technical Service Manager (TSM) serves as the customer's trusted technical advisor for OpenText solutions hosted on OpenText-managed cloud environments. With a deep understanding of the customer's unique business use cases built on OT applications, TSM offers technical guidance and acts as a technical liaison throughout the engagement.
The TSM will assist in the timely resolution of critical issues and facilitate proactive routine administration to help maintain the application's expected operational state. Drive and monitor ongoing technical improvement initiatives to ensure continuous optimization.

TSM Scope

TSM Service	Role Description

Transition Oversight (*Go-Live Cutover*)	• Lead Technical oversight during the TSS transition. • Review Production Readiness Assessment (PRA) & Outcomes. • Escalates technical risks and gaps to enable a smooth handover.
Technical Incident & Problem Management	• Share technical insights during customer review calls (as applicable). • Facilitate technical analysis during escalations and major incidents. • Participates in RCA walkthroughs. • Conduct incident trend analysis and recommend corrective actions. • Maintains customer documentation.
Maintenance & Upgrade Advisory	• Conduct patch and upgrade assessments. • Provide recommendations and prepare deployment schedules. • Support end-to-end implementation for retrofitting functional enhancements and integrations post-upgrade.
Non-Standard Requests (NSRs) Fulfilment & Value-Added Services	• Manages end-to-end delivery of Non-Standard Requests (NSRs) and value-added services listed in the Success Catalog. • Handle requirements gathering, solution design, effort estimation, and execution oversight.
Performance Readiness Validation	• Facilitate performance baseline testing during critical milestones such as go-live cutovers, major upgrades, and key releases.
Solution Health Check Reviews	• Conducts periodic assessments of system architecture, configurations, performance, and capacity. • Provide recommendations to improve scalability, reliability, and long-term stability.

Technical Success Engineer (TSE) -

Provides expert experience which ensures Customer(s) are set up for success.

Activities:

- Provides technical assistance for all end user-reported technical incidents, problems, or service requests.
- Help manage priority issues, field questions, log, and work on priority issues, interact with you regularly, and handle critical issues while working with the extended OpenText teams.
- Available during standard Success Services hours.

- Provide support for Custom Integrations and Functional Enhancements

4.4 Incidents and Service Requests

4.4.1 Initiation of a Service Ticket

Success Services are provided under the Customer Success Services to address Incidents associated with performance or usage issues. Performance and usage issues are situations where the Cloud Services are not performing substantially in accordance with defined SLAs. Performance and usage issues may be caused by:

1) Error or defect (related to the design, coding, or architecture of the Cloud Services)

2) usage or configuration Error (related to usage of the Cloud Services or the installation, configuration, or setup of the Cloud Services)

3) environmental error (related to the network, hardware, and operating systems).

Service Tickets for Success Services to address any issues should be initiated by a POC using the Customer Service Portal located at https://support. opentext.com. These customer self-service tools will automatically initiate a Service Ticket and send you an associated tracking number.

As an OT Cloud customer, you are encouraged to:

- Keep your record of Client-Side software always updated in the Customer Service Portal. This may include client operating systems, browser technologies, etc.

- Provide OT Success Services with the information it reasonably needs to Classify and log the Service Ticket Wherever possible, use the SR Service Ticket number for each communication with OT cloud support.

Customer is responsible for the provision of Level 1 and Level 2 Support (as defined in Section 2) to its users.

A Service Ticket should be opened with OT Level 3 Support only when a request cannot be serviced by the Customer. To raise a Service Ticket, a POC must initiate the Service Ticket using the Customer Service Portal located at https://support.opentext.com; We recommend critical Incidents are raised by telephone. OT classifies Service Tickets into two different categories:

Incident: An issue that adversely impacts the quality of the Cloud Service, preventing or hindering Authorized Users from carrying out a normal business function.

Service Request: Request for something to be provided or modified such as a request for information, 'how-to' type assistance for an Authorized User, or a request to execute application administration tasks on behalf of Customer.

Customer can raise both Incidents and Service Requests on the Customer Service Portal.

4.4.2 Incidents

Incident Management aims to Restore the Cloud Services as quickly as possible to minimize the impact of an Incident on the Customer's use of the Cloud Services When a Service Ticket has been classified as an Incident, OT has the following responsibilities to ensure a prompt response:

- Incident triage, categorization, and prioritization.

- Investigation and diagnosis.

- Provide Customer with periodic progress updates.

- Restoration.

- Incident closure.

4.4.3 Service Requests

There are two types of Service Request that can be raised:

• **Standard Service Requests** are pre-approved, routine administrative tasks that do not require change control. A list of available Standard Service Requests will be documented in the Request Catalogue generated during Onboarding phase. The number of Standard Service Requests available to the Customer is specified in the Cloud Services Agreement. The number of Standard Service Requests consumed will be tracked and reported to the Customer. Where the trend suggests the quota will be exhausted before the end of the then-current contract year, Customers may top up the number of Standard Service Requests for an additional fee.

• **Non-Standard Service Requests** are more complex and usually not routine in nature. They may require analysis or scoping to establish the appropriate course of action and effort required to execute them. In addition, they may require change management approval before the request can be implemented. Requests not included in the Request Catalogue are categorized as Non-Standard Service Requests. The Non-Standard Service Requests are capped and are specified in the Cloud Services Agreement. Consumption of Non-Standard Service Requests will be tracked and reported to the Customer. Where the trend suggests the quota will be exhausted before the end of the then-current contract year, Customers may top up the Non-Standard Service Requests for an additional fee.

Customer is responsible for the execution of all self-service application administration tasks, as defined in the Request Catalogue. Should Customer request OT to perform such tasks, OT can do so, however this will consume Standard Service Requests. Customer may be required to purchase service add-ons.

4.4.4 Incident & Service Request Response Times

The priority assigned to an Incident by the Customer is reviewed and validated by OT based on its urgency (how quickly the Customer needs resolution) and the impact (the degree to which use of the

Cloud Services have been disrupted). OT observes three types of Incident classifications, as described in the table below. Each Incident will be classified by OT as listed in the table below. OT will consider, in good faith, Customer request to reclassify an Incident. Response and Restoration Times are targets and cannot be guaranteed in all circumstances by OT.

Classification	Incident & Service Request Definition	Target Response Time Within	Target Restoration Time Within
Critical (P1)	**Incident**: An Incident will be classified as critical if the issue reported causes the Production Instance to be functionally inoperable (entire system is down).	15 Minutes, 7x24 Critical incidents must be logged by phone to OT directly	4 Hours, 7x24
High (P2)	**Incident**: An Incident will be classified as High if the issue reported significantly degrades the performance of the Production Instance or materially restricts use of the Cloud application (e.g., system is operational, but performance may be impacted).	2 Business Hours, 5x8	12 Business Hours, 5x8
Moderate (P3)	**Incident**: An Incident will be classified as moderate if the issue reported does not materially restrict the use of the Cloud application in Production. **Service Request**: All Service Requests for Production Instances are classified as Moderate.	4 Business Hours, 5x8	48 Business Hours, 5x8
Low (P4)	**Incident**: General Inquiries and sharing information with OpenText All Incidents for Non-Production Instances are classified as Low. **Service Request**: All Service Requests for Non-Production Instances are classified as Low	8 Business Hours, 5x8	48 Business Hours, 5x8

OT may require technical information or log files for components that reside within Customer responsibility (for example to investigate an Incident, during root cause analysis, or for the purpose of performance improvements).

Should the Customer be required to provide input into the resolution of an Incident the Incident status will be updated to reflect this and time spent waiting for the required input will not be counted towards the Restoration Time measurement.

Should the Customer technical contact be unavailable, OT will escalate the request with the Customer.

For all Critical Incidents, once the Cloud Services have been Restored and the Incident closed, OT will initiate Problem Management activities to determine the source of the Incident, and any actions required to prevent its recurrence

4.5 OT Response to a Service Ticket

4.5.1 Service Ticket Dispatch

Service Tickets will be dispatched as follows:

a. If the Service Ticket involves Cloud Services, then Service Ticket will be forwarded to OT Success Services for Classification and Restoration (described in Section 6.2 below).

b. If the Service Ticket involves a product that is developed by a third party, the Service Ticket may be referred to that third party.

c. If the source of the Service Ticket is unclear, the ticket will be forwarded to OT Success Services for further investigation and, once the source of the Service Ticket is determined, it will be dispatched as described above in sections 6.1 (a) and (b).

d. If the source of the Service Ticket is not related to the OT Cloud, OT may, where possible, attempt to provide a workaround and/or may, where possible, report the problem to the appropriate vendor for Restoration.

4.5.2 Restoration of Service Ticket

OT Success Services shall attempt to address each Service Ticket, regardless of classification, through the offering of technical advice, by locating an existing workaround or by creating a new workaround or may apply a product patch. Once production Cloud Service is restored, the Service Ticket Classification is downgraded and root cause analysis may continue, as requested.

4.5.3 Conditions of Service Ticket Restoration

OT Success Services shall attempt to address each Service Ticket, regardless of classification; OT will have no obligation to provide a Restoration of Cloud Service for your Service Ticket as described above unless:

- You have authorized OT to install and implement all the most recently available relevant updates. OT Success Service will make that request if it reasonably believes that the installation and implementation is necessary to achieve Restoration of your Service Ticket; AND,

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- You are using the Cloud Services as specified in Documentation; AND,

- The Service Ticket has, as determined by OT, not been caused by you, including, but not limited to your use and/or configuration of development tools and a third-party resource; AND,

- Your POC is available to actively participate with OT on diagnosis, testing, and Restoration. OT reserves the right to suspend its obligations under this Handbook during any time(s) in which a competent POC is unavailable for such participation; AND,

- Your POC has received appropriate training, as determined by OT, within a reasonable amount of time of the deployment date (fees for such training are not covered by the OT Customer Success Services); AND,

- You have provided OT with all the information necessary to allow OT to reproduce the Service Ticket.

4.6 Problem Management

A Problem is defined as a cause of one or more Incidents. The cause is not usually known at the time a Problem record is created. The primary objectives of Problem Management are to prevent recurring Incidents from happening, if possible and to reduce the impact of subsequent recurrences.

Problems can be logged from multiple sources:

1. Customer can log a Problem to be investigated
2. CSS team can log Problem(s) based on Incident trend analysis.
3. CSS team can log Problem(s) based on proactive review of logs, performance, and other system specific measures.

Once a Problem is registered, investigation begins to find the underlying cause. Once the cause is identified a workaround or a resolution is provided, if possible.

4.7 Change Management

OT governs operational change management activities to record, evaluate, authorize, prioritize, and plan all changes in a controlled manner. Should Customer wish to implement an operational change to the Cloud Services that Customer cannot self-service it should raise a Service Request stating the nature of the required change.

OT change management has several different change types, each having different lifecycle and approval processes to ensure balance, as OT determines is commercially reasonable, between the need for responsiveness against the management of risk.

4.7.1 Types of Change

The three categories of types of change are:

- **Standard Change:** Changes where the implementation process and the risks are known in advance. Standard changes are low risk with established procedures documented in a template that are pre-approved by OT's Change Advisory Board (CAB).
- **Normal Change:** Changes where the implementation process is more complex, and/or the risk associated with change requires it be communicated, scheduled, validated, and approved before being implemented.
- **Emergency Change:** Changes that arise from an unexpected error or threat to the Cloud Services, such as an Incident that impacts the availability, stability, performance, or security of the Customer configuration that needs to be addressed immediately. Emergency change records are opened to address an open, ongoing Critical or High Incident in the Production instance.

Changes to the Customer configuration may be mutually agreed during the term of the Cloud Services Agreement and may result in additional fees.

4.7.2 Requesting and Authorizing System Changes

Authorized Change Contacts must open a Service Request with any changes they would like to make and include details of those changes. A Change Request form detailing the change requested, work required to implement, and any associated impact and cost will be agreed to prior to any work commencing, which will trigger the change process.

4.7.3 Implementing System Changes

To ensure your OT Cloud Services adhere to our operational and security controls, policies and procedures, the OT Cloud environment is closely controlled. Technical administration and access for Production and non-Production (i.e., Test) instances is restricted to OT Success Service resources to maintain our Service Level Agreements. Unless otherwise agreed, only OT Cloud staff are allowed access to the operating system layer of the servers and to the restricted administrative tiers of the applications, where all access is in accordance with our roles and responsibilities supporting least privilege access and segregation of duties.

The Customer remains solely responsible for the system development lifecycle testing processes for any code changes they request. Downtime experienced due to implementation of such requested changes is excluded from the calculation of SLA downtime, if any is specified in the Cloud Services Agreement.

All changes are deployed initially on the Test system by the technical application team in accordance with change policy. Once deployed on Test, the Customer can review and test the changes.

4.7.4 Documenting System Changes

Delivered changes are documented and deployment timelines planned mutually with the Customer.

As per the Cloud Services Agreement, Change Requests function as amendments to your Cloud Services Agreement detailing your Cloud Services. This ensures that an accurate directory of all application-

installed components is maintained, covering both core OT released product patches as well as configurations and customized changes.

4.7.5 Service Updates

The Success Service includes activities to update installed software, including OT products, databases, operating systems, middleware, security software, etc. (collectively known as "Service Updates"), with the intent that installed software remains current and patched to the version recommended by OT at least once per calendar year. The decision to apply Service Updates will be mandated at OT's sole discretion.

Where Service Updates include new features and functions, Customer may require professional services (at additional cost) to access and use such functionality within the Cloud Services e.g., implementation of new product features, configuration changes, new Functional Enhancements, or changes to existing Functional Enhancements.

Customer will be responsible for modifying Customer-developed Functional Enhancements to maintain compatibility with upgraded Cloud Services resulting from a Service Update. The decision to apply Service Updates shall not be impacted because of any such Customer-developed Functional Enhancements. However, OT will coordinate the timing of such updates with the Customer.

OT observes three types of maintenance– routine, scheduled, and emergency maintenance (together, "**Maintenance Activities**").

- **Routine Maintenance**. OT may temporarily reduce or interrupt access to the Cloud Services from time to time during the term of the Cloud Service Agreement for the purpose of generally maintaining or updating the Cloud Services. The OT Cloud Maintenance Guide publishes a schedule of times when routine maintenance may be conducted.

- OT will also apply patches regularly within the published maintenance windows. Routine maintenance activities that require a service interruption will be communicated to Customer, or their delegate, at least five (5) business days in advance.

- **Agreed Maintenance**. In some circumstances OT and Customer may mutually agree to conduct maintenance or implement changes on the Cloud Services outside of the predefined maintenance windows. For example, Customer can request a service interruption to have OT deploy application-level changes on their behalf if they do not want to wait for the next available published maintenance window. All such Customer-requested maintenance must be jointly agreed in advance between Customer and OT.

- **Emergency Maintenance**. OT reserves the right to conduct emergency maintenance which may require an interruption within business hours to address an urgent issue that could not reasonably have been prevented by OT using IT industry standard practices and preventive measures described in the Cloud Service Agreement. For example, this might be required due to operational, technical or security reasons where public safety, security, interoperability of services, or data is at risk. OT may temporarily limit or suspend the availability of all or part of your Cloud Services if it is necessary. Emergency downtime events declared by OT will be communicated to Customer in advance when possible.

OT will use commercially reasonable efforts to coordinate the scheduling of Maintenance Activities to minimize the disruption to Customer.

4.7.6 Custom Build Deployments

All customer releases will be managed by OT, facilitating the promotion from non-production instances to the production environment. The responsibility for creating release notes and installation instructions rests with the Customer or their designated partner.

Custom Build Deployments are capped as specified in the Cloud Services Agreement, and their usage is monitored and reported to the Customer. If consumption trends suggest possible depletion before the contract year concludes, customers may choose to purchase additional custom deployments at a fee or utilize their allocated Success Flex Days. Unused custom deployments will expire at the end of each contract year.

4.8 Support for Functional Enhancements

All Functional Enhancements must be mutually agreed in the Cloud Services Agreement (or an amendment thereto) before they can be accepted into the Cloud Services. OT reserves the right to uplift service fees for any changes onboarded to the Cloud Services.

Due to differences in the scope of service and roles and responsibilities between the Customer and OT, Functional Enhancements and Custom Integrations developed by OT and those developed by the Customer (or a Customer appointed third-party) are treated differently.

Close collaboration will be required between OT and Customer (or Customer's nominated third-party) to support and maintain the operational effectiveness of each Custom Integration as only the components of the Custom Integration deployed in the OT Cloud are under OT control.

4.8.1 OT-developed Functional Enhancements

OT-developed Functional Enhancements are fully supported in accordance with section 5 (Support Requests) of this Handbook. Work required to provide break fix support, modify the functionality of existing Functional Enhancements, or develop new Functional Enhancements is excluded from the scope of the Cloud Services and will be subject to mutual agreement which may include additional service fees.

4.8.2 Customer-developed Functional Enhancements

Customer is responsible for maintaining all Customer-developed Functional Enhancements agreed to be included in the scope of the Customer Success Service, throughout the term of the Cloud Services. Activities required to support Customer development activities will be subject to mutual agreement which may include additional service fees.

At a minimum, Customer shall be required to engage OT to provide the following services to support Customer development activities during the term of the Cloud Services:

- Conduct a review of the Customer-developed Functional Enhancements to ensure they meet OT's operational requirements in terms of stability and security,

- Provide support for user acceptance testing and any other testing required by Customer to support business and operational acceptance of the updated application configuration, and

- Undertake to promote accepted and released Customer-developed Function Enhancements in an application release cycle. Customer may be subject to additional fees should deployment packages repeatedly fail at no fault of OT.

The following roles and responsibilities apply to the handling of Incidents for all Customer-developed Functional Enhancements:

- OT will be responsible for the initial investigation and isolation of the issue reported in the Incident. OT will undertake operational tasks necessary to minimize the impact of such Incidents on Authorized Users.

- Customer is responsible for the investigation, isolation, and provision of a fix for issues relating to Customer developed Functional Enhancements. All development activities, including the provision of patches and any required testing will be the responsibility of Customer.

- OT will deploy Customer-provided and OT-approved patches required to address defects in Customer-developed Functional Enhancements in accordance with OT's change and release management practices post Go-Live, deployments related to Customer-developed Functional Enhancements shall occur during business hours unless jointly agreed otherwise.

4.9 Third-Party Products in the OpenText Cloud

Product support activities for third-party products resold by OT are the responsibility of the third-party. OT will operate these products in the OT Cloud and will manage interactions with the third-party vendor; however, the third-party vendor is solely responsible for the third-party product lifecycle and the release of all software updates, including product patches. OT will review and asses all third-party products and the decision to add any third-party product will be at OT's sole discretion.

4.9.1 OpenText Solution Extensions("SolEx") and Technology Partner Products

OT has a large partner ecosystem which produces extensions to OT product capabilities, many of which have been certified for OT Cloud deployments. Should Customer have a requirement for any third-party partner products already certified by OT, there is no additional pre-requisite validation work required to have such products approved for use in the OT Cloud.

If your selected OT partner product(s) have not previously been certified for deployment in the OT Cloud, OT can work through a certification process with the OT partner; however, OT cannot guarantee that the partner product will pass the certification process.

OT will administer the third-party products as described in the applicable agreement under the guidance of the third-party product vendor. In no circumstances will the third-party product vendor be granted administrative access to the third-party product installed in the OT Cloud.

4.9.2 Independent Third-party Products

In some cases, Customer may request an independent third-party product to be deployed and operated as part of the Cloud Services. OT reviews and assesses all third-party products before allowing them to be run as part of the Cloud Services. The inclusion of any independent third-party product(s) in the scope of the Cloud Services must be mutually agreed in writing between the parties. OT cannot guarantee that third-party product vendors apply equivalent standards to those used by OT and it is possible that a request to include an independent third-party product in the scope of the Cloud Services may be rejected.

Some key points applicable to independent third-party products are:

- Customer must maintain all valid license rights and entitlements to the independent third-party product that allows for cloud deployment as agreed between OT and Customer by OT and provides access to support from the vendor of the third-party product.

- OT does not guarantee compatibility of any third-party products with OT products or Cloud Services.

- Customer is responsible for resolving any security vulnerabilities identified in the third-party products.

- The vendor of the third-party product is responsible for releasing new versions of third-party product.

- OT will work with third-party vendors to resolve issues directly applicable to third-party products, but the vendor of the third-party product is responsible for providing resolution to any third-party product issues.

- OT will exclude all unplanned outages and Service Tickets caused by independent third-party products (not SolEx or OT Technology Partner products) from any service level remedies applicable.

- If a new version of the third-party product compatible with the OT product is available and the third-party license entitles the Customer to obtain (and OT to deploy) the new version, then OT will apply updates provided by the independent third-party to approved independent third-party products running in the OT Cloud in parallel with an upgrade or update to the Cloud Services under the same update terms described in Section 8.3 (Service Updates) of this Handbook. If no compatible release of the independent third-party product is available, the existing version must support the updated OT product release.

If changes to the Customer configuration are required due to incompatible third-party products, these will be considered outside the scope of the Cloud Services and will be subject to a separate mutual agreement and fee. Should an unresolvable incompatibility exist between any independent third-party product and the Cloud Services, the Customer and OT will negotiate in good faith to find an acceptable resolution, which may include replacing the functionality delivered by the incompatible third-party product with a compatible product or service.

5 Success Management

5.1 OT Success Management

Success Management includes access to a named Customer Success Manager (CSM) who will create, monitor, and update a standard Customer Success Plan (CSP) using standard OT success planning methodology. The completed Customer Success Plan defines the Customer's vision, and goals related to the use of the Cloud Service.
CSM are also responsible for the co-ordination of post sales delivery of the Cloud Services.

Success Management is provided by the allocation of an English-speaking named Customer Success Manager who can be contacted by phone or email.

The Customer Success Managers are part of the OT Customer Success Services team, and their main responsibilities include:

- Internally champion the Customer's interests by voicing their needs and objectives within OT.

- Act as the liaison to address the Customer's specific needs with OpenText, to promote clear communication, program coordination, and efficient escalation.

- Collaborate with the Customer to establish a standard CSP for tracking their vision, and goals.

- Conduct routine business reviews to align with their strategic goals

- Access to the workshop guide and success planning resources and up to 1 workshop per contract year; to review business use cases, refine business process, and identify ongoing or changing needs and priorities.

- Facilitate Customers' comprehension of specific use cases for deployed solutions and their organizational benefits

- Oversee the internal knowledge transfer process from OT pre-sales to ensure Customer goals, and initiatives are accurately conveyed.

- Oversee the receipt and assignment of projects and non-standard/custom service requests (CRs) not covered by the existing Cloud Services Agreement through a predefined change request process.

- Facilitate support and service request prioritization during standard OT cloud support hours.

- Follow support and service request through to conclusion and facilitate all escalations related to OT Customer Success Services with the relevant organization within OT

- Working with the OT Customer Success Service teams, coordinate all production changes to ensure continuity and communications between, incident, problem, and changes.

- Coordinate product roadmap reviews to ensure Customers are aware of most current features and functionality.

- Facilitate Customer's product update (upgrade) planning, coordinate update scheduling, and address open items following the upgrade.

The CSM will collaborate with relevant OT personnel involved in delivering services to internally implement the standard CSP (as further defined below). The CSM does not assume the defined responsibilities of these personnel in terms of implementation or service delivery but will work in coordination with these teams and engage OT personnel as needed.

5.2 Success Services Meeting Structure

The following meeting structure will be typically agreed during Onboarding:

- **Service Review Meeting:** A regular review of service activities and achievement against service levels. Usual frequency is monthly.

- **Escalation Meeting:** Ad Hoc meetings convened as necessary to address any service delivery or process concerns. These meetings may be initiated by either the Customer or OT.

- **Governance Meeting:** This meeting reviews the performance of the Cloud Services engagement; helps align service delivery with evolving Customer needs; can be used to update Customer on relevant OT product roadmaps.

- **Program Status Meeting:** This meeting focuses on the Service Ticket activities of the Success Services engagement, including any planned changes or active projects. Activities are prioritized to ensure OT remains focused on tasks that add the most value. Usual frequency is weekly during periods of significant levels of change

- **Customer Success Plan Meeting:** A regular meeting to focus on reviewing the progression of the documented goals in the Customer Success Plan and any program updates. This meeting will focus on all elements of Customer Success Services not related to Support or programmatic/planned changes.

5.3 Service Status Report

As part of the CSS the Customer Success Manager will deliver regular service status reports as part of the Service Review meeting. Usual frequency is monthly.

This report will include, but is not limited to, the following elements:

- Service Ticket summary: closed, open and wait.

- Overview of all Service Tickets logged and in progress (open).

- Overview of all Service Tickets waiting on input from Customer (wait).

- Overview of all Service Tickets resolved (closed).

- Usage summary of any additional and optional support programs or services the Customer is subscribed to.

- Metrics and other items as agreed in the Cloud Services Agreement

A distinction will also be made in the report between support, product, consultancy, and training requests.

5.4 Success Planning Methodology

The Customer Success Manager will use OT success planning methodology when necessary for joint planning, engagement, and decision-making throughout the Customer journey. This will include, but is not limited to, the following:

- Define the joint roles and responsibilities of all stakeholders to participate in the success planning process.

- Define and agree on the success goals, plays, and metrics to be used as part of the success program.

- Establish joint governance framework and key activities and engagements to monitor success.

- Establish process and triggers for risk and successes through the Customer lifecycle.

- Develop a scorecard to regularly communicate key metrics and business milestones tracked and value realized.

5.5 Customer Success Plan

The standard Customer Success Plan (CSP) is the primary deliverable of the Customer Success Manager. As an industry known practice, the standard CSP is an ever-evolving tool that creates joint accountability and governance and is used to document the customers goals and outcomes. The CSM will own, manage, and maintain the standard CSP, in conjunction with the Customer throughout the duration of the Cloud Services Agreement.

6 Performance Monitoring Analysis & Insights

Overview

The Cloud Performance Monitoring Analysis & Insights offers customers high visibility into availability, live application health status, and potential risks by displaying synthetic transactions of customer applications included in the Cloud Services and underlying infrastructure managed by OpenText Cloud. A standard set of metrics is configured as part of the service, providing customers access to performance data.

Benefits

1. Access to application performance via quarterly reports.
2. Proactive identification and resolution of potential application risks.
3. Enhances customer confidence in application stability.

Outcomes

1. Setup of Cloud Monitoring, configuration of synthetic transactions, and determination of threshold limits.
2. Quarterly Performance Monitoring Analysis & Insights
3. Proactive response to severe alerts exceeding predefined limits.
4. Performance trend analysis, reporting, and recommendations.

7 Solution Health Review

Overview

This service includes Architecture, Performance Configuration & Capacity Review, providing strategic advisory to understand application usage, allocated capacity, and scalability to meet business demands.

Outcomes

1. Architecture Review
2. Capacity Usage Trends (network load, number of documents, number of users, storage growth trends, complexity of business processes/reports, etc.)
3. Performance Analysis: Identify bottlenecks and provide recommendations.
4. Capacity Management: based on growth estimates (e.g., disk space, memory optimization, server additions, database and index optimization, load balancing, etc.)
5. Review of the product roadmap.
6. Review of configuration based on Best Practices

Results

1. Performance, Configuration & Capacity Recommendations Report.

8 Performance Baseline Testing

Overview

Performance Baseline Testing assesses the responsiveness and stability of a standard set of product transactions under expected load conditions. Unlike general performance testing, which focuses on scalability and stress thresholds, baseline testing is intended to establish and validate benchmark performance levels for critical transactions during both pre-production and post go-live phases.

Objectives

- Establish baseline performance metrics for standard product transactions.
- Validate system responsiveness under defined concurrency conditions (as per engineering guidelines, e.g., CSD-25).
- Provide reference performance metrics to evaluate the impact of future product changes or critical release milestones.

Benefits

1. Increases confidence in system readiness prior to go-live.
2. Identifies early signs of performance degradation in essential user scenarios.
3. Enables proactive comparison of current performance against established baselines following system updates.

Scope

Baseline testing is limited to the following five predefined user transactions:

1. Average Login Response
2. Average Browse Response
3. Average Search Response
4. Upload
5. Download

Additional scope details:

- Tests are executed under expected concurrency conditions (e.g., 10% of licensed users).

- Focus is limited to a set of standard functionalities.

Conducted in both pre-production and post go-live environments to ensure consistent performance standards
Outcomes

- Performance metrics are captured during the pre-production phase to establish baseline benchmarks.
- Post go-live testing is conducted to validate continued system performance and detect any performance drift.
- Additional baseline testing may be performed during moments that matter, such as major upgrades, infrastructure changes, or critical product releases.
- Any deviation from the baseline is analyzed to identify performance bottlenecks or optimization opportunities.
- Reports provide actionable insights to support system tuning and performance stabilization, if required.

Deliverables
1. Baseline Performance Test Report
2. Performance Benchmark Summary (response times and concurrency levels)
3. Deviation Analysis & Recommendations (if applicable)

9 Success Flex Days

The Signature Tier includes a predefined allocation of 'Success Flex Days' for additional support in Cloud Services. Please refer to the "Success Services Catalogue" for details. The number of allocated Success Flex Days is limited per contract year, and any unused days will expire at the end of each Contract Year.

TSS will conduct an assessment to determine the actual scope and cost of the requested service(s). If these services exceed your Flex Day entitlements, an additional Contract Change Request may be required (subject to a fee). Flex days can also be used to fulfill standard or non-standard requests and application releases that exceed the yearly contractual entitlements. Flex Days can also be utilized to request additional business reporting requirements.

Examples of consulting and post-implementation technical assistance for which Success Flex Days can be used include (but are not limited to):

- Lower Environment Refresh
- Disaster Recovery Advisory Services
- Developer Support
- Standby Services
- Capacity Forecasting

The Customer and OT mutually agree to coordinate in advance for scheduling the utilization of Success Flex Days, acknowledging potential variations in resource availability. To optimize scheduling efficiency, it is recommended to provide sufficient lead time between the request and the required service; a minimum of 3 weeks is advised to enhance resource availability.

The utilization of Success Flex Days included in the Cloud Service Agreement or purchased during its term is as follows:

- A rate of one (1) Success Flex Day per business day (8 hours) applies.
- Working hours are typically between 8 am and 5 pm unless otherwise agreed.

Customers can collaborate closely with OT's Customer Success Manager to leverage available Success Services and receive guidance and support throughout their OpenText journey.

About OpenText

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