



AVEVA

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AVEVA™ Customer  
FIRST Program  
User Guide

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# AVEVA™ Customer FIRST Program User Guide

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# Table of contents

<b>1. AVEVA CUSTOMER FIRST PROGRAM .....</b>	<b>4</b>
<b>1.1. PROGRAM OVERVIEW .....</b>	<b>5</b>
<b>1.2. OPTIONAL SERVICES .....</b>	<b>6</b>
<b>2. PRICING .....</b>	<b>6</b>
<b>2.1. SUPPORT REINSTATEMENT FOR LAPSED ENROLLMENT.....</b>	<b>6</b>
<b>3. INCLUDED SERVICES.....</b>	<b>7</b>
<b>3.1. TECHNICAL SUPPORT AND SERVICES .....</b>	<b>7</b>
3.1.1. Business Hours Technical Support (Normal Local Business Hours).....	7
3.1.2. Knowledge and Support Center Website .....	7
3.1.3. Customer FIRST Mobile Support App .....	8
3.1.4. Level 2 – Direct Technical Support .....	8
3.1.5. En Route Response Plan for Billable Onsite Corrective Assistance.....	8
3.1.6. Discount on Technical Support Consulting Services.....	9
3.1.7. eLearning .....	10
3.1.8. Cloud Application Accessibility Support (24/7/365) .....	10
3.1.9. Emergency 24-Hour Technical Support (24/7/365) .....	10
3.1.10. Technical Support Priority Response Commitment .....	10
<b>3.2. SOFTWARE MAINTENANCE AND UTILITIES .....</b>	<b>11</b>
3.2.1. Software Version Upgrades and Revisions.....	11
3.2.2. Software Maintenance Releases, Service Packs, Patches, Updates and Hotfixes .....	12
3.2.3. License Assurance.....	12
3.2.4. Discount on Test and Offline Development System Licenses .....	13
3.2.5. AVEVA System Monitor .....	13
<b>3.3. ADDITIONAL BENEFITS: MINIMUM ANNUAL CONTRACT VALUE REQUIRED .....</b>	<b>14</b>
3.3.1. Block of Technical Support Consulting Services .....	14
3.3.2. Included Training for Your AVEVA Software Product (Classroom, Virtual Instructor-led and eLearning +Plus) .....	14
3.3.3. Complimentary Invitations to AVEVA Software Customer Events.....	15
<b>4. OPTIONAL SERVICES .....</b>	<b>15</b>
<b>4.1. SUCCESS SERVICES.....</b>	<b>15</b>
4.1.1. Flexible Funding for Services .....	15
4.1.2. Success Accelerators .....	16
4.1.3. Resident Engineer.....	16
4.1.4. Customer FIRST for Solutions .....	16
<b>5. AVEVA TECHNICAL SUPPORT.....</b>	<b>18</b>

<b>5.1. AVEVA SUPPORT MODEL .....</b>	<b>18</b>
<b>5.2. CONTACTING TECHNICAL SUPPORT.....</b>	<b>19</b>
5.2.1. Accessing Cloud Support .....	19
5.2.1.1. Service Status.....	19
<b>5.3. OBTAINING EMERGENCY 24X7 SUPPORT.....</b>	<b>19</b>
5.3.1. Contact Information for Emergency Support.....	19
<b>5.4. CASE SUBMISSION.....</b>	<b>20</b>
<b>5.5. GATHER HELPFUL INFORMATION BEFORE YOU CONTACT US .....</b>	<b>20</b>
<b>5.6. WHAT HAPPENS WHEN YOU REQUEST SUPPORT.....</b>	<b>21</b>
<b>5.7. SUPPORT ESCALATION POLICY AND UPDATE FREQUENCY.....</b>	<b>21</b>
5.7.1. Initial Response Target .....	22
5.7.2. Escalating Your Issue .....	23
<b>5.8. WHEN IS YOUR CASE CLOSED? .....</b>	<b>23</b>
<b>5.9. SUBMITTING A FEATURE REQUEST.....</b>	<b>23</b>
<b>5.10. REQUESTS AND ELIGIBILITY FOR SOFTWARE FIX .....</b>	<b>24</b>
<b>5.11. REMOTE SUPPORT.....</b>	<b>24</b>
<b>5.12. SUPPORT FOR THIRD PARTY AND RESALE PRODUCTS .....</b>	<b>24</b>
<b>5.13. CUSTOMER CONTRACTORS AND AVEVA TECHNICAL SUPPORT.....</b>	<b>24</b>
<b>6. AVEVA WARRANTY AND SUPPORT.....</b>	<b>24</b>
<b>7. LIFECYCLE AND SUPPORT POLICIES.....</b>	<b>25</b>
<b>8. APPENDIX A - FLEXIBLE SERVICES FUND POLICY.....</b>	<b>26</b>
<b>9. APPENDIX B – CUSTOMER FIRST FOR SOLUTIONS.....</b>	<b>28</b>

# 1. AVEVA Customer FIRST Program<sup>1</sup>

The AVEVA Customer FIRST program is a fee-based software maintenance and technical support program designed for end-users to extract and retain the maximum benefit from their AVEVA software investments, including software delivered via one of our flexible subscription options. Customer FIRST is purchased in the form of an annual or multi-year agreement, purchased separately or as part of your software subscription.

Customer FIRST is the foundation of your service and support relationship with AVEVA and our global partner network. It offers a comprehensive portfolio of services, including software version upgrades and maintenance, expert technical support and success-based services to help you get the most value possible from your investment in our software and keep your operations running smoothly.

The AVEVA Customer FIRST program includes:

- Continuous software maintenance and innovation through software version upgrades to evolve your software solution to best address your changing business needs.
- Access to technical support experts that are adept at resolving issues quickly, capitalizing on years of experience.
- Optional services, resources, and system management applications to efficiently maintain and optimize the performance of your software and meet your changing business needs.

Customer FIRST offers exceptional customer-focused software maintenance, services and support and is specifically designed to help you:

- Improve Operational Performance through accelerated project development and maximize return on investment while minimizing implementation risk.
- Protect Critical Investments through product enhancements and the newest technology upgrades, keeping your software and applications current and “state-of-the-art”.
- Maximize Asset Performance through improved performance levels of your system and plant assets.
- Reduce Total Cost of Ownership (TCO) by minimizing downtime and process interruption and improving operator productivity.

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<sup>1</sup> Delivery of the support services under the AVEVA Customer FIRST program is governed by the AVEVA General Terms and Conditions found on <https://www.aveva.com/en/legal/>, unless otherwise agreed in writing.

## 1.1. Program Overview

The AVEVA Customer FIRST program is a portfolio with three distinct program levels –Standard, Premium and Elite<sup>2</sup>. Your program level selection may depend on project and commissioning milestones, the complexity and criticality of your operations, the maturity of your systems and the expertise of your project resources.

Included services	Standard	Premium	Elite
<b>Technical support and services</b>			
Business hours technical support (normal local business hours)	✓	✓	✓
Knowledge and Support Center website	✓	✓	✓
Customer FIRST mobile support app <sup>1</sup>	✓	✓	✓
Level 2 - direct technical support	✓ <sup>2</sup>	✓	✓
En route response plan for billable onsite corrective assistance	NBD	24 hours	4 hours
Discount on technical support consulting services	5%	10%	20%
E-Learning	✓	✓	✓
Cloud application accessibility support (24/7/365)	✓	✓	✓
Emergency 24-hour technical support (24/7/365)		✓	✓
Technical support priority response commitment			✓
<b>Software maintenance and utilities</b>			
Software version upgrades and revisions	✓	✓	✓
Software maintenance releases, service packs, patches, updates and hotfixes	✓	✓	✓
License assurance <sup>3</sup>		✓	✓
Discount on test and offline development system licenses		✓	✓
AVEVA™ System Monitor			✓
<b>Additional benefits for customers meeting a minimum annual contract value</b>			
Block of technical support consulting services		16	24
Included training for your AVEVA software product (classroom or virtual instructor-led)		1	2
Complimentary invitations to AVEVA software customer events		2	5

1. Refer to the [detailed description in 3.1.3](#) for usage limitations

2. Only available at Premium and Elite levels when purchased through AVEVA Partner

3. License assurance included for all subscriptions/cloud-hosted software

<sup>2</sup> The availability of specific program levels varies depending upon the AVEVA solutions you have installed. Your account manager can advise you.

## 1.2. Optional Services

The AVEVA Customer FIRST Program also offers the flexibility to tailor your agreement to the specific needs of your business by purchasing Optional Services on top of your core program level. The services are designed to further help you maximize productivity, accelerate projects and protect your investment.

Optional services	Standard	Premium	Elite
Flexible funding for services	✓	✓	✓
Success Accelerators	✓ <sup>4</sup>	✓	✓
Resident engineer		✓	✓
Customer FIRST for solutions		✓	✓

4. Only available at Premium and Elite levels when purchased through AVEVA Partner

## 2. Pricing

The AVEVA Customer FIRST Program is an annual fee-based software maintenance and support program, included with your AVEVA software subscription or purchased separately. The annual fee is calculated as a percentage of the list price of AVEVA software at your facilities or sites.

### 2.1. Support Reinstatement for Lapsed Enrollment

AVEVA *strongly encourages* you to renew your Customer FIRST support enrollment on time and prior to the expiration date. Your entitlement to access AVEVA technical support and service resources (including access to our Knowledge and Support Center website) will expire on your Customer FIRST agreement end date. Additionally, should a lapse in your support enrollment occur, you may be charged a reinstatement fee. The amount of the reinstatement fee may increase the longer the enrollment has lapsed, so *please* renew your Customer FIRST enrollment before it expires.

## 3. Included Services

AVEVA is focused on helping you transform your operations by empowering you to be more agile, more efficient, more effective and more competitive, with outstanding, innovative open systems.

The AVEVA Customer FIRST Program delivers essential support and services to help you achieve maximum system performance and reliability. Whether you are planning your new installation, running stable operations with no desire to change anything, keeping your systems up to date with the latest updates, or planning a major upgrade to your existing installation, the Customer FIRST Program provides a comprehensive and continuously evolving portfolio of valuable services that help you maximize your return on investment, mitigate risk and ensure continued success.

### 3.1. Technical Support and Services

#### 3.1.1. Business Hours Technical Support (Normal Local Business Hours)

**Included in the following support levels: Standard, Premium, Elite**

AVEVA provides expert technical assistance during normal business hours via regional support centers and locally-based service engineers. Each request is processed through a well-defined multi-level response model that assures a skilled and timely response appropriate to the urgency and complexity of the reported situation. Reported situations are assessed according to the impact on the customer's production, safety or environment.

Notes:

- All customers who purchase their Customer FIRST agreement through an authorized AVEVA Distributor are served by Level 1 Distributor CSP (Certified Support Provider) distribution facilities during local business hours.
- Customers participating in the Standard level of the program who have purchased their agreement through a local AVEVA Distributor will be entitled to support solely from that distributor.
- Customers participating in the Premium or Elite level of the program who have purchased their agreement through a local AVEVA Distributor will also be entitled to contact AVEVA Technical Support directly during business hours (see [Level 2 - Direct Technical Support](#) below).
- Customers who purchase their Customer FIRST agreement from AVEVA directly are entitled to access AVEVA Technical Support directly, regardless of program level enrollment.

#### 3.1.2. Knowledge and Support Center Website

**Included in the following support levels: Standard, Premium, Elite**

Reliable information is the key to effective product and system usage. AVEVA makes available its extensive knowledgebase of technical user documentation, issue solutions, product trends and software updates through our Knowledge and Support Center website. Access to the website also allows you to leverage the knowledge of your peers using our Community forums.

The AVEVA website provides you with on-demand product downloads, as well as case management. Logon to the website anytime to submit and review your requests for technical support<sup>3</sup>.

Our Knowledge and Support Center website address is: <https://softwaresupport.aveva.com/>.

For access to the AVEVA support portal for PI System products visit our website at <https://my.osisoft.com/>.

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<sup>3</sup> Cases opened with your local AVEVA Distributor CSP will not be visible on the AVEVA Knowledge and Support Center Website. Access to case management via the website is subject to your Customer FIRST program level enrollment and purchasing channel – see [section 3.1.1](#).



### 3.1.3. Customer FIRST Mobile Support App

**Included in the following support levels: Standard, Premium, Elite**

The Customer FIRST App is a mobile application (smartphone or tablet application) designed to give you access to support when you're on the go and to help you understand your support and service entitlements. The Customer FIRST app:

1. Provides you with the latest information regarding the Customer FIRST Program, including your technical support ID for accessing support, and real-time notification of available software updates that can then be downloaded via Electronic Software Delivery (ESD). You can use the app to review our upcoming customer events and training classes or send a one-click request to your local account manager for the latest software updates.
2. Is integrated with AVEVA's Knowledge and Support Center website, allowing you to submit and review your cases when you're on the move.

The Customer FIRST Mobile Support App is available for both iPhone and Android devices.

**Notes:**

- Your login credentials for our Knowledge and Support Center website are also your username and password for the app.
- AVEVA PI System products are not currently supported on the mobile app.

### 3.1.4. Level 2 – Direct Technical Support

**Included in the following support levels: Standard\*, Premium, Elite**

The Customer FIRST program provides you with direct access to experienced technical resources within the AVEVA Technical Support team. You have the flexibility of engaging your local AVEVA Distributor (if you purchased your support agreement through one and depending upon your program level) or with AVEVA Technical Support Level 2 directly for any technical issue you encounter.

**Note:**

- \*This entitlement is only included at Premium and Elite levels when purchasing your Customer FIRST agreement through an AVEVA Distributor.

### 3.1.5. En Route Response Plan for Billable Onsite Corrective Assistance

**Included in the following support levels: Standard, Premium, Elite**

AVEVA solutions are reliably supported through a remote connection (VPN or web conference). This approach provides fast, effective support, particularly in emergency situations. If our technical support engineers are unable to resolve your technical support case using remote methods, AVEVA resources are available to provide hands-on corrective assistance at your site.

A skilled AVEVA technical support engineer will commit to providing a plan, within the designated timeframe, to travel to your site to perform necessary corrective actions to return your production system or application from an emergency situation that involves the loss of significant operational functions to a stable, operational state. These activities may include system troubleshooting, and software restoration<sup>4</sup> or correction due to data corruption.

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<sup>4</sup> Software restoration may be accomplished using install discs or via download. If the customer's data is corrupt, there may be no recourse, in some cases, to restore corrupted user data.

While this type of support is typically time-sensitive in nature, en route response time commitment<sup>5</sup> is determined by your level of Customer FIRST enrollment:

- Elite – 4 hours\*
- Premium – 24 hours\*
- Standard – Next Business Day\*

Notes:

- Activities that are not covered by Onsite Corrective Assistance include application work, block configuration, display creation, historian creation, software installation, preventative maintenance work and startup support.
- Labor and materials, travel and living expenses are billable. Billable labor hours include travel time, time spent obtaining plant access, time spent onsite and offsite performing evaluations and preparing documentation necessary for the assigned tasks.

### 3.1.6. Discount on Technical Support Consulting Services

**Included in the following support levels: Standard, Premium, Elite**

AVEVA Consulting Services enable you to leverage skilled AVEVA resources that can help you manage complex migrations, optimize the performance of your existing assets, conduct routine performance assessments and assist you with new product deployment. The Customer FIRST Program provides you with access to discounts on Consulting Services delivered by the experts within our Technical Support team.

Whether you are planning a new project and need help architecting a solution or want recommendations to optimize the performance of your existing application for a single-site project or a global, enterprise-wide engagement, we will help you make arrangements with qualified resources within AVEVA. As always, AVEVA Consulting Services combine best-in-class software technologies with in-depth process, plant and IT expertise.

- Elite – 20% discount
- Premium – 10% discount
- Standard – 5% discount

Notes:

- This discount provided under the Customer FIRST Program is applied to standard services pricing and cannot be combined with any other discount, including corporate/volume pricing discounts applicable to Consulting Services.
- This discount can be applied to Success Accelerators.

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<sup>5</sup> \*This commitment is dependent upon availability of regional resources and arrival time is dependent on transportation contingencies beyond AVEVA's control. Your AVEVA account manager will work with you to define the response commitment appropriate for your site.

### 3.1.7. eLearning

**Included in the following support levels: Standard, Premium, Elite**

The journey to performance can be efficient and effective when using well-designed training programs. AVEVA Customer Education Services provides all the components to effectively bridge the gap between where you are today in terms of technical performance and where you want your personnel to be in the future. Your access to AVEVA eLearning includes a wide range of self-guided content, including videos, recorded presentations, job aids, PDFs, downloadable files, webinars, interactive eLearning, and knowledge checks.

**Notes:**

- Qualified eLearning courses are tagged a “eLearning” and will include the “this course is free to enroll” message under the Enroll button on the course page.
- eLearning +Plus content on the AVEVA Learning Academy is not included.
- Availability of eLearning modules varies depending upon AVEVA product.
- Additional introductory content for AVEVA PI System can also be found our AVEVA PI System Learning channel on YouTube.

Visit the AVEVA Learning Academy to learn more about our training options: <https://learningacademy.aveva.com/>.

### 3.1.8. Cloud Application Accessibility Support (24/7/365)

**Included in the following support levels: Standard, Premium, Elite**

AVEVA provides you with 24-hour access to technical support for user access and connectivity issues related to CONNECT, our industrial cloud platform.

### 3.1.9. Emergency 24-Hour Technical Support (24/7/365)

**Included in the following support levels: Premium, Elite**

AVEVA provides emergency technical support outside of normal business hours for situations that involve loss of significant software operational functions on the production system or plant downtime situations.

**Notes:**

- AVEVA provides after-hours support in the English language only.
- Access to after-hours support is provided for “P1 – Critical” issues as defined in the [Case Priority Levels](#) table.

### 3.1.10. Technical Support Priority Response Commitment

**Included in the following support levels: Elite**

Your technical support cases will receive prioritized handling by our Technical Support team. Your Elite level enrollment ensures that you will have expedited access to our technical support engineers when opening your cases, leading to expedited resolution times<sup>6</sup>.

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<sup>6</sup> Total time to resolution will depend upon the complexity of the reported issue and customer engagement during the case management and resolution process.

## 3.2. Software Maintenance and Utilities

### 3.2.1. Software Version Upgrades and Revisions

**Included in the following support levels: Standard, Premium, Elite**

Keep your software and systems up-to-date with access to software version upgrades and revision releases. The Customer FIRST program provides you with the ability to upgrade and keep covered AVEVA software continuously current.

The version release is the most significant software upgrade. It generally contains major new features and enhancements. The Revision release generally contains both software correction and minor enhancements.

License(s) and upgrade media will be made available upon release, in electronic or physical format as appropriate, during the coverage period of your program enrollment. AVEVA also provides you with on-demand access to product downloads via our Knowledge and Support Center website.

**Notes:**

- AVEVA makes no guarantee that version and revision releases will become available during such enrollment period.
- Customers using our software on our common cloud platform, CONNECT, inherently get the latest software and applications in environments maintained and managed by AVEVA.
- Availability of version upgrades and revisions is subject to our Software Lifecycle Policy, which can be found on our Knowledge and Support Center website.
- Software version upgrade and revision installation and startup activities are not part of the Customer FIRST Program - these activities require the scheduling of a separate site visit for which the labor terms of your enrollment will apply.
- Operating Systems and other 3<sup>rd</sup> party software (i.e. operating systems, anti-virus software etc.) upgrades are not included under this benefit.
- Your Customer FIRST enrollment must be active at the time the software version upgrade or revision is requested. Eligibility to request upgrades and revisions at no charge ends at agreement expiration. Additionally, the following eligibility requirements must be met:

**Version Upgrade Eligibility:**

- Upon enrollment, AVEVA software must be at the current/preferred minimum Version level in order to be eligible for future AVEVA Version upgrades. If AVEVA software is not at the current/preferred minimum Version level at the time the Customer FIRST agreement is executed, the customer must first purchase the upgrade version to get current. Once the above criteria is met, entitlement to future AVEVA software Versions begins and will continue for as long as an active Customer FIRST agreement (Standard, Premium or Elite level) is maintained with no lapse in support coverage.

**Revision Upgrade Eligibility:**

- For customers enrolled in Standard, Premium or Elite levels of Customer FIRST Program, the eligibility for the future AVEVA revision upgrades will continue for as long as an active Customer FIRST agreement (Standard, Premium or Elite level) is maintained with no lapse in support coverage.

### 3.2.2. Software Maintenance Releases, Service Packs, Patches, Updates and Hotfixes

**Included in the following support levels: Standard, Premium, Elite**

With the Customer FIRST Program, AVEVA provides releases and fixes for covered software related to your application that is released during your enrollment period. This entitlement applies to software that is in a current lifecycle phase.

Maintenance releases provide corrections to software defects within a software revision level.

Media will be made available upon release, in electronic or physical format as appropriate, during the coverage period of your program enrollment. AVEVA also provides you with on-demand access to product downloads via our Knowledge and Support Center website.

**Notes:**

- AVEVA makes no guarantee that maintenance releases will become available during the agreement period.
- Customers using our software on our common cloud platform, CONNECT, inherently get the latest software and applications in environments maintained and managed by AVEVA.
- Installation labor for version licenses, revision releases, maintenance releases, service packs, patches and updates, and startup activities is not included in this program feature. These activities may require the scheduling of a separate site visit for which the labor terms of your enrollment will apply.

### 3.2.3. License Assurance

**Included in the following support levels: Premium, Elite**

The Customer FIRST Program entitles customers enrolled in the Premium or Elite level to make up to two (2) requests to have lost licenses/license keys reissued during their annual agreement period.

Where your AVEVA product is licensed to a specific computer/MAC address, in the event the original machine is decommissioned, Customer FIRST entitles customers to transfer the original licenses to a new machine at no additional cost.

**Notes:**

- License Assurance provides coverage for on-premises licenses. Cloud-hosted product availability is governed by your AVEVA Subscription and/or AVEVA Cloud Services Agreement.
- Requests can be made for a single license or multiple licenses.
- A Replaced License must be removed from any device and its original license file, license CD, and/or license certificate must be destroyed or archived and clearly marked as “inactivated” so that it cannot be used.
- If a lost/stolen key is found/recovered, it must be destroyed.

### 3.2.4. Discount on Test and Offline Development System Licenses

**Included in the following support levels: Premium, Elite**

The Test, Simulation, and Emergency Back-up System Program is designed to duplicate or mirror some or all of your on-line (i.e. production) system with an off-line (i.e. non-production) system for the purposes of testing, simulation, or emergency back-up. The Customer FIRST Program provides access to a 50% discount on software licenses to be used for the duplicate system.

**Notes:**

- Customers must agree that all software licenses in the off-line system will solely be used for non-production testing or simulation or emergency back-up purposes and for no other purposes whatsoever. Applicable system will be non-production and off-line except for temporary periods during emergency back-up situations such as disaster recovery or failover (off-line System).
- The off-line system licenses are to be identical to the on-line system licenses in product type but may be of lesser quantity or functional capacity (lower IO, lower tag count, less Equipment). Certain product exclusions may apply.

### 3.2.5. AVEVA System Monitor

**Included in the following support levels: Elite**

The AVEVA System Monitor software application—installed at your plant—continuously monitors your applications and system hardware, identifies upset conditions and alerts you to potential issues before they manifest into real problems like software application errors or machine downtime events. System Monitor helps you maximize system availability and increase your production yield and revenue while also enabling you to better manage system resources to improve asset performance. The System Monitor application will allow you to:

- Identify and address issues early to avoid adverse effects on operations.
- Monitor your assets 24/7/365, with early notification of issues.
- Quicken resolution times with pinpoint error detection.
- Effectively manage your staff with automated system management.
- Reduce the volume of high priority issues.
- Streamline the diagnosis process with precise alert notification.

**Note:**

- AVEVA System Monitor is currently only compatible with AVEVA Operations software. More information can be found within the Product Hub on the AVEVA Knowledge and Support Center website:  
<https://softwaresupportsp.aveva.com/#/producthub>.

## 3.3. Additional Benefits: Minimum Annual Contract Value Required

### 3.3.1. Block of Technical Support Consulting Services

**Available to the following support levels: Premium, Elite**

The Customer FIRST Program provides qualified enrolled customers with a block of onsite or remote Technical Support Consulting Services for larger installations. Your block of Technical Support Consulting Services can be used, for example, for system health checks or optimization audits and software migration review.

- Premium – 16 hours\*
- Elite – 24 hours\*

**Notes:**

- \*This is the base quantity provided to customers meeting the minimum spend. Depending on your spend, you may qualify for additional quantities.
- Travel and living expenses related to an onsite visit are billable.
- Any labor hours that are required to complete work that are in excess of those hours provided under the agreement are billable.
- Unused hours cannot be rolled forward into the next 12-month term or Agreement coverage period.

### 3.3.2. Included Training for Your AVEVA Software Product (Classroom, Virtual Instructor-led and eLearning +Plus)

**Available to the following support levels: Premium, Elite**

Get the training solution you need with a comprehensive, world-class training course that matches the power and excellence of your AVEVA software. You can apply your included training benefit to our catalog of instructor-led training classes (virtual or in an AVEVA facility classroom). You can also choose from our eLearning +Plus catalog which includes advanced and structured learning assets with defined and broader learning objectives and outcomes. These assets may include one or more of the complex eLearning simulations, lab exercises, training workbooks, virtual lab environments, hands-on lab exercises, and self-guided coursework.

Qualified Customer FIRST members will receive:

- Premium – 1 seat\*
- Elite – 2 seats\*

**Notes:**

- \*This is the base quantity provided to customers meeting the minimum spend. Depending on your spend, you may qualify for additional quantities.
- Seats can be used for any standard classes listed in the AVEVA course catalog and cannot be used for custom training.
  - Where available, seats may be used for Private Classes. Class size is limited to a minimum of six (6) students and a maximum of twelve (12) students.
    - Six (6) seats will be redeemed for such classes.

- This entitlement covers the tuition fee for the training course only and does not include Travel and Living expenses such as hotel, transportation, meals, etc. related to classroom or onsite training. Additional fees might apply for virtual environments.
- Unused seats cannot be rolled forward into the next 12-month term or Agreement coverage period.
- IF you are qualified for training seats you will be issued a voucher code which can be redeemed when registering for a course on the [AVEVA Learning Academy](#). Talk to your account manager to access your code or email [avevatraining@aveva.com](mailto:avevatraining@aveva.com).

For more information about AVEVA training visit the AVEVA Learning Academy: <https://learningacademy.aveva.com/>.

### 3.3.3. Complimentary Invitations to AVEVA Software Customer Events

#### **Available to the following support levels: Premium, Elite**

AVEVA hosts customer-focused events on an annual basis. These events provide customers with a tremendous opportunity to meet with AVEVA core engineering, development, executive management and technical support staff, as well as to discuss corporate direction and preview emerging solutions from AVEVA.

The Customer FIRST Program provides qualified customers with complimentary passes to these events.

- Premium – 2 passes\*
- Elite – 5 passes\*

Notes:

- \*This is the base quantity provided to customers meeting the minimum spend. Depending on your spend, you may qualify for additional quantities.
- This entitlement covers the registration fee for the AVEVA customer event and does not include Travel and Living expenses related to attending the event.

## 4. Optional Services

### 4.1. Success Services

AVEVA offers a variety of optional services – including Success Accelerators – that complement a Customer FIRST agreement. Our extensive portfolio of services are outcome-based and focused on accelerating adoption. The cost of these optional services varies based on the scope and complexity involved and will be quoted separately from your Customer FIRST program enrollment.

#### 4.1.1. Flexible Funding for Services

##### **Optional for the following support levels: Standard, Premium, Elite**

Customer FIRST Program coverage provides you with labor-based support and services that are billable at local AVEVA labor rates at time of service. These include Onsite Corrective Assistance, Technical Support Consulting Services, and time spent installing software associated with Customer FIRST Program entitlements. The service or support engineer's travel time to and from your site is billable, as is associated travel and living expenses.

Provisioning the optional Flexible Services Fund with funds that accrue as part of your scheduled agreement payments allows you to spread payment of applicable labor-based services over the coverage period of your Customer FIRST enrollment. An appropriate amount can be established based on the number of anticipated labor hours for your company, site(s) and situation multiplied by the prevailing local AVEVA service rate. AVEVA can help you make this determination.



Usage will be deducted during the enrollment period, and any residual balance remaining at the end of the enrollment period will be applied to establish a beginning balance of Flexible Services Fund for the consecutive renewal period of enrollment.

See [Section 8](#) for Flexible Services Fund Terms and Conditions.

### 4.1.2. Success Accelerators

#### **Optional for the following support levels: Standard\*, Premium, Elite**

AVEVA has an extensive and growing collection of optional Success Accelerators, delivered by our Technical Support experts. Success Accelerators are targeted, short-term services crafted to deliver specific and tangible outcomes. They provide access to advanced AVEVA product expertise to address both technical and operational challenges you may have across all lifecycle stages of your AVEVA software.

Find more information regarding available Success Accelerators on our website: <https://www.aveva.com/en/support-and-success/>.

Note:

- \*This entitlement is only included at Premium and Elite levels when purchasing your Customer FIRST agreement through an AVEVA Distributor.

### 4.1.3. Resident Engineer

#### **Optional for the following support levels: Premium, Elite**

Increase your on-site engineering capacity by supplementing your resources with a full-time or part-time AVEVA Resident Engineer. The role of a Resident Engineer is to address your unique needs and objectives, provide technical assistance and strategic direction, and to act as your support advocate within AVEVA. Each Resident Engineer possesses a strong background in their respective area of technical expertise, along with strong communication and management skills. The Resident Engineer combines problem-solving skills with proactive management skills relating to technical support and operational issues.

Note:

- The full scope of work for the Resident Engineer will be coordinated by your account manager in consultation with you and will be clearly defined in your enrollment.

### 4.1.4. Customer FIRST for Solutions

#### **Optional for the following support levels: Premium, Elite**

As an optional service to the Customer FIRST program, AVEVA has developed a comprehensive set of services – Customer FIRST for Solutions – to address the unique technical support and application maintenance requirements through the lifecycle of a customized solution. By combining Customer FIRST for Solutions with Customer FIRST product support services, you will have access to both technical support engineers focused on product performance and configuration support, as well as our highly specialized solution support team with expertise in the entire engineered solution. The combined product and solution support approach provides a comprehensive suite of services to fully support a customized AVEVA solution through standardized processes, application lifecycle maintenance and through a single point of contact.

The component services available under Customer FIRST for Solutions may include:

- Support Transition Services
- Application Support
- Integration Support

- Sustaining Maintenance
- Solution Knowledge Management
- Offline Application Clone Services
- Solution Consulting Services
- Enhancement Services
- Upgrade Assessment and Services

Note:

- Your account manager will work with you to determine the solution support services you need and to determine the appropriate services to embed in your agreement.

For full details of the Customer FIRST for Solutions Program see [Section 9](#).

## 5. AVEVA Technical Support

AVEVA ensures that the utmost care is taken at every step of the development, manufacturing and on-going support cycles that, in turn, affect our relationships with our customers. Stringent procedural methodologies are employed in the daily operations of our Technical Support centers.

Support activities are measured against targeted service levels to help ensure we provide a high-quality support experience for our customers. Periodic internal and external audits ensure that organizational processes stay on track. External surveys help us understand our customers' perceptions of their support experience.

When you contact any AVEVA Technical Support center or a third-party AVEVA Certified Support Provider, Subject Matter Experts (SMEs) are quickly engaged in answering your questions in order to help you troubleshoot, diagnose and resolve the issue at hand. Your request for support enters a globally-shared case management system that ensures every query and issue is resolved effectively, efficiently and in a timeframe appropriate to the urgency of the reported situation.

AVEVA customers are supported by a unified global organization that is best in class. Our specialized product resources have the flexibility to leverage other resources within our global organization to ensure that our products and services are running at optimal levels, helping you succeed in the long term.

### 5.1. AVEVA Support Model

AVEVA sells its software through an extensive global network of direct AVEVA sales experts and Certified Support Provider (CSP) distributor facilities. CSPs are third-party distributor facilities certified by AVEVA.

How you access technical support resources will depend upon who you purchase your software and support through and your program level enrollment:

Sales Channel	Program Level	Support Provider
<b>AVEVA Direct Account Manager</b>	Standard, Premium, Elite	AVEVA Technical Support
<b>AVEVA-authorized Distributor</b>	Standard	Distributor CSP*
<b>AVEVA-authorized Distributor</b>	Premium, Elite	Distributor CSP or AVEVA Technical Support

\*If the CSP is unable to resolve the problem, the CSP will escalate your issue to one of the AVEVA Technical Support (Level 2) centers on your behalf. AVEVA will then work with the Distributor to arrive at an appropriate solution.

#### MULTI-LEVEL RESPONSE MODEL (ESCALATION MODEL):

Case movement is as follows:

1<sup>st</sup> Level: Certified Support Provider (CSP) or AVEVA Technical Support

2<sup>nd</sup> Level: AVEVA Technical Support Manager

3<sup>rd</sup> Level: AVEVA Development

## 5.2. Contacting Technical Support

To obtain the current contact information for your local AVEVA Technical Support center or an AVEVA Certified Support Provider please visit our website: <https://www.aveva.com/en/support-and-success/support-contact/>.

You can also email [custfirstsupport@aveva.com](mailto:custfirstsupport@aveva.com).

### 5.2.1. Accessing Cloud Support

Any issues related to CONNECT, user accounts or user connectivity to AVEVA Cloud should be reported to the AVEVA Global 24x7 Cloud Support team via email: [cloud.support@aveva.com](mailto:cloud.support@aveva.com).

#### 5.2.1.1. Service Status

AVEVA maintains a real-time status dashboard, where you can get updates on the status and system health of our cloud offers via <https://status.connect.aveva.com/>.

We use this dashboard to publish notifications for scheduled maintenance updates to our solutions, and if there are any interruptions to service, we will provide an initial status along with regular updates until we return service to normal. You can also subscribe to relevant alerts to be notified of postings as they are made.

## 5.3. Obtaining Emergency 24x7 Support

AVEVA provides emergency technical support outside of normal business hours for situations that involve loss or potential loss of significant software operational functions on the production system or plant downtime situation.

*Note: Reporting and other ancillary functions are not included under the definition of emergency support. It is expected that technical support for non-production applications will resume the following business day, during normal business hours.*

### 5.3.1. Contact Information for Emergency Support

Calls received via our emergency service phone numbers will be automatically routed to a live phone dispatcher. The dispatcher will then contact one of the available technical support analysts/engineers who will return the call within 60 minutes.

Emergency technical support can be obtained by dialing **+1-949-639-8500**, accessible worldwide.

The AVEVA phone system will automatically identify your company via your individual phone user ID. From there, follow the phone prompts to be routed directly to our Emergency Support dispatcher.

***Important: When contacting AVEVA Technical Support for the first time, you will be issued an individual phone user ID. You should have this phone user ID on hand every time you call AVEVA Technical Support. Your call will not be routed properly via the telephony system if you enter your Customer FIRST agreement/contract number. Your individual phone user ID can be retrieved via the Customer FIRST app or via the AVEVA Knowledge and Support Center website.***

## 5.4. Case Submission

AVEVA offers you multiple methods for submitting your technical support issue:

- Telephone: Log your issue with one of our technical support analysts or engineers.
- Web: Log your issue using our online case submission form via our technical support websites or mobile app.

All cases entered into the AVEVA case management system can be accessed by AVEVA support centers across the globe. Our support centers collaboratively monitor this case-handling stream to ensure that every open case is assigned to appropriate personnel, who may be located anywhere in the world.

## 5.5. Gather Helpful Information Before You Contact Us

To make the most of your time when you contact AVEVA to request technical support, please have the following information on hand:

- Your Customer FIRST User ID, if known.
- The assigned case number if this is an open issue.
- Product component and software version.
- Any patches installed if the issue relates to a software application.
- If the situation involves a software application only, know the operating system type and version.
- System topology and design architecture.
- Relevant output from diagnostic applications.
- Are there any third-party hardware cards in the machine?
- Are there any third-party software applications running?
- Was the application tried on a different machine?
- Have you tried to reproduce the problem, and if so, what was the result?
- What have you done to troubleshoot the situation?

## 5.6. What Happens When You Request Support

When you contact AVEVA Technical Support or submit a question via our Knowledge and Support Center website, we will quickly process your request. Support enquiries are processed with the following methodology:

- Receipt of your inquiry is acknowledged.
- Your Customer FIRST Program enrollment level is verified.
- The inquiry is logged into our case management system and the case number provided for reference.
- The issue is prioritized based on commercial or technical urgency.
  - When speaking with the technical support engineer, you can request that a specific priority level be assigned to your case and we will do our best to accommodate your request - AVEVA will make the final determination according to [Case Priority Levels](#) as defined below.
- AVEVA begins to diagnose and resolve the issue as quickly as possible.
- If the technical support engineer requests that you provide application files for further investigation, you will be advised of the appropriate available methods of transmission -- via email or FTP site.
- If necessary, we will strive to reproduce the behavior to help determine its root cause.
- Once root cause is determined, we will determine a course of action with the goal of achieving problem resolution.
- You will be regularly updated as to the status of your case including any measures taken by AVEVA to escalate your issue to higher level subject matter experts.

## 5.7. Support Escalation Policy and Update Frequency

Based on the assigned priority level of your case, AVEVA Technical Support will take appropriate action to resolve your question or issue. That is, given the priority level, here's what we will do:

Case Priority Levels		
Priority Level	Definition	Action To Be Taken
<b>P1 - Critical</b>	System or process downtime, loss of essential function, critical business or operational impact, human safety or environmental impact.	AVEVA Technical Support will work on the case full-time, including evenings and weekends as necessary, until it is resolved or an appropriate workaround is found.
<b>P2 - Serious</b>	Feature(s) inoperable, no evident workaround, failure of one or more components, degraded operation of an essential function, potential business or operational impact, up against a hard deadline.	AVEVA Technical Support will work on the case full time during normal business hours.
<b>P3 - Moderate</b>	Feature is inoperable and a workaround is possible, operational question, minimal or no business or operational impact	AVEVA Technical Support will work on the case during normal business hours.
<b>P4 - Informational</b>	Informational question, no business or operational impact, customer request, or next day call back is acceptable.	AVEVA Technical Support will work on the case during normal business hours.

### 5.7.1. Initial Response Target

Depending upon your Customer FIRST program level enrollment and the priority level of your case, AVEVA Technical Support applies the initial response targets shown in the table below when handling your case. The initial response target is met when the first activity related to the case is:

- performed by our technical support engineer **AND**
- is communicated to you or is viewable as an activity under the case details in the case management area of our Knowledge and Support Center website **AND**
- is performed within the target amount of time shown in the chart

Initial Response Target			
Priority Level	Standard	Premium	Elite
<b>P1 - Critical</b>	2 hours	1 hour	30 minutes
<b>P2 - Serious</b>	4 hours	2 hours	1 hour
<b>P3 - Moderate</b>	16 hours	12 hours	8 hours
<b>P4 - Informational</b>	24 hours	16 hours	12 hours

*Note: The elapsed time for the purposes of determining whether Initial Response Target is met is the time elapsed during the normal business hours of the receiving AVEVA Customer Support regional center, except for P1 enquiries where the elapsed time includes both business hours and after-hours.*

In addition, AVEVA Technical Support will provide you with regular updates on your issue based on the priority level of the case and your Customer FIRST program level:

Update Frequency			
Priority Level	Standard	Premium	Elite
<b>P1 - Critical</b>	Once per day	12 hours	6 hours
<b>P2 - Serious</b>	2 days	Once per day	Once per day
<b>P3 - Moderate</b>	5 days	4 days	3 days
<b>P4 - Informational</b>	8 days	5 days	5 days

*Note: The update frequency schedule is based on the time elapsed during the normal business hours of the receiving AVEVA Customer Support regional center, except for P1 enquiries where the elapsed time includes both business hours and after-hours.*

While it is our intent to resolve your case as quickly as possible, we cannot project an exact resolution at the onset of the issue. This is because it depends on the complexity of your question or issue and the speed at which we receive any requested documentation or diagnostic output from you.

### 5.7.2. Escalating Your Issue

AVEVA Technical Support has processes and systems in place to ensure that your incident will receive proper attention and be managed according to its priority by the appropriate people in our department, as well as other relevant AVEVA departments.

## 5.8. When Is Your Case Closed?

AVEVA will work to quickly resolve your question or issue based on the assigned priority level. Your case will be closed when it falls under one of these categories:

- Your question has been satisfactorily answered and it requires no further activity.
- The issue has been resolved via a Fix, Patch, Service Pack, or Major / Minor product release.
- Your issue was determined to be a software defect, which will be resolved in a future Patch, Service Pack, Fix or in the next release of the product. When the Patch, Service Pack, Fix, or Maintenance Release becomes available, you will be notified by email. Patches, Service Packs and Fixes will be made available via the Knowledge and Support Center website. AVEVA Patches, Fixes and Service Packs will be incorporated into a future product release.
- Your question or issue results in correction in the AVEVA product's user manual and/or on-line help system.
- Your issue is caused by running a third-party software or hardware product that is not owned or distributed by AVEVA. We'll explain the cause of the problem and recommend your next course of action.
- Your question or issue concerns a desired product feature that is not part of the product's current release. We will convert your issue into a product enhancement request, which will be forwarded to the AVEVA portfolio and product management group for further evaluation.
- You request that you no longer wish for us to work on your question or issue.
- You request that your case be closed.
- We require additional input from you but cannot reach you after making several attempts via known contact points (telephone, email). However, if you contact us after we have closed your logged case, we will be happy to reopen it.

## 5.9. Submitting a Feature Request

AVEVA strives to continually improve our portfolio of products in terms of new and improved features and product performance. We strongly encourage you to submit your ideas and suggestions on the use of AVEVA products.

You may submit your feature requests to us by contacting your AVEVA Technical Support center.

Your request will be initially handled as a case, with entry into our case management system. If your request is subsequently determined to be more appropriately handled as product enhancement or feature request, your case will be "closed" and submitted to AVEVA's portfolio group. You will be notified of this action.

Your enhancement request (defined as a request for modification to an existing product specification, a new product feature or function) will be logged as such and assigned a tracking number which will then be emailed to you for reference. The next step is a review and prioritization of all enhancement requests by the AVEVA Portfolio Group. These requests will then enter the product definition cycle for upcoming releases of that product. Requirements for a release are prioritized according to their business value as determined by the Portfolio Group.



## 5.10. Requests and Eligibility for Software Fix

A “Fix” is a software module designed to correct a single (typically) software defect. Fixes may be tested via a full quality assurance process or be unit tested (i.e. minimally tested) to speed their delivery to customers experiencing critical issues. Customers may request a Fix, however, the final decision with respect to the technical feasibility and appropriateness of providing a Fix rests with AVEVA.

Fixes are subject to the following requirements:

1. A Fix must be formally requested by the customer.
2. Members of the Customer FIRST Program are eligible to request Fixes.
3. It is at the sole discretion of AVEVA to issue a Fix. Decisions will be based on feasibility, scope and complexity and other factors.

## 5.11. Remote Support

AVEVA utilizes proven remote access technologies to expedite resolution of technical support issues. These technologies are utilized with customer participation and used in a way that ensures your systems’ security. If consistent with your security requirements, AVEVA will also use its own technology for remote access. Using remote access technologies can dramatically improve the resolution time of your issues.

## 5.12. Support for Third Party and Resale Products

Support for Third party or Resale Items, as defined in AVEVA’s general terms and conditions, is independent of the support provided by AVEVA for the AVEVA Products and Services under the AVEVA Customer FIRST Program and is governed by the partner's support model, which includes their respective response times and case handling processes. AVEVA's support services, as described in this document, do not extend to any Third Party or Resale Items unless explicitly stated otherwise. AVEVA may facilitate communication or collaboration with the Third Party or Resale Item’s support team as needed, but ultimate responsibility for resolving these issues rests with the Third Party or Resale Item vendor.

## 5.13. Customer Contractors and AVEVA Technical Support

If a Customer is engaging a third party contractor to provide production/run-time support on its behalf under their Customer FIRST enrollment then that third party contractor must be clearly affiliated with the Customer when registering for technical support with AVEVA and opening cases on their behalf. In these instances, AVEVA requires a Customer’s third party contractor to be setup with an email address tied to the Customer’s corporate domain.

# 6. AVEVA Warranty and Support

AVEVA’s warranty protection is defined in the AVEVA General Terms and Conditions. Warranty protection does not include access to technical support during the warranty period.

To help ensure that you benefit from an optimal first year experience with your new installation, AVEVA recommends that you supplement your warranty with enrollment in the AVEVA Customer FIRST Program. With Customer FIRST Program coverage, access to expert technical support and comprehensive services will help ensure successful initial operation and on-going system performance.

## 7. Lifecycle and Support Policies

AVEVA Product Lifecycle discipline plays a strong underlying role in customer support. All products move through lifecycle phases as they age. AVEVA customers can greatly benefit from having a clear understanding of product lifecycle phases, which have a direct relationship to the supportability of each product.

AVEVA has established clear product support timelines to enable customers to plan product upgrades in advance of reaching obsolescence. This proactive approach provides a comprehensive view of product lifecycle phases, phase transition timing, and available support during each phase.

Logon to the AVEVA Knowledge and Support Center website for current product lifecycle information:

<https://softwaresupport.aveva.com/>.

Current product lifecycle information for AVEVA PI System products can be found at <https://my.osisoft.com/>.

## 8. Appendix A - Flexible Services Fund Policy

### Flexible Services Fund can be used for:

- The following labor-based services associated with Customer FIRST Support and Services Agreement features:
  - Success Accelerators
  - Consulting services, including:
    - System and network configuration, performance optimization
    - Database configurations, expansion or resizing to meet new requirements, data recovery
    - Software deployments to production system environment
    - Additional software documentation, testing and validations
  - Onsite technical support
  - AVEVA training
- AVEVA service personnel travel hours to/from the customer site
- Travel and living expenses related to Customer FIRST Support and Services Agreement features

### Flexible Services Fund cannot be used for:

- Consulting Services not provisioned under the Customer FIRST Support and Services Agreement
- Labor hours for any activities, products, software, programs and solutions not related to Customer FIRST Support and Services Agreement features
- Travel and living expenses not related to Customer FIRST Support and Services Agreement features
- Software/product purchases

### The following terms and conditions apply to the Flexible Service Fund:

1. The Flexible Services Fund may be provisioned by the customer for a value that will accrue during the coverage period of the Customer FIRST Maintenance and Services Agreement, in accordance with the terms of the Agreement. Allocation to the Flexible Services Fund may differ each year within a multi-year Agreement.
2. Customer's contribution to the Flexible Services Fund will be made together with Agreement payments in accordance with the agreement billing schedule. It may be increased or decreased at renewal of the Agreement. Customer's contribution cannot be cancelled during the annual term or multi-year coverage period.
3. The scope of services usage can be defined at any time prior to, or during, the Agreement coverage period. Delivery of services must be taken within the coverage period.
4. As applicable services are provided, the selling price will be deducted from the Flexible Services Fund. Once the Flexible Services Fund's value has been fully used, no further services can be applied. If desired, customer may replenish funding for use during the remainder of the coverage period.
5. At Agreement expiration, unused Flexible Services Fund balance:

- a. may be rolled forward, establishing a beginning balance in the Flexible Services Fund upon renewal of the Agreement for the next coverage period
  - b. cannot be applied to the Agreement itself on renewal
  - c. will not be refunded to the customer
- 6. If the Agreement is terminated prior to its expiration date, accrued unused Flexible Services Fund balance will not be refunded to the customer.
- 7. If the Agreement is terminated prior to its expiration date, a lump-sum invoice will be issued for Flexible Services Fund usage above the accrued customer contribution.

## 9. Appendix B – Customer FIRST for Solutions

Customer FIRST for Solutions is a set of services that provide lifecycle support for Advanced Solutions built on AVEVA software products and engineered/ implemented by the AVEVA solution development and integration team. Customer FIRST for Solutions is available to be purchased in conjunction with your Customer FIRST program enrollment. Available services and associated benefits are presented below.

- **Support Transition Services** – Solution Support Engineers (SSEs) engage in the pre-production project delivery phases to gain an in-depth knowledge and understanding of the solution and integration points. This process helps to transition expertise and ultimately ensures continuity of support for your engineered solution long after the implementation team completes the project.
- **Application Support** – Each application is unique and may include custom-developed features and functionality that ultimately address the business requirements. Our knowledgeable solution support team is readily available should a client experience an issue with the application. They will focus on the application-specific aspects of the solution, providing efficient resolution and improving plant performance.
- **Integration Support** – Integration of front office business systems with manufacturing applications is often required and sharing data between systems is frequently accomplished via custom-developed interfaces that become critical to the overall operation. The solution support team takes ownership of the integration and will fully support and quickly respond to any issue that disrupts the data flow between business systems, thus minimizing any impact on the production environment.
- **Sustaining Maintenance** – To meet a client's unique requirements and extend product capabilities, solution development will typically include custom code and configurations. The solution support team provides the engineering services required to protect your engineering investment by ensuring that the custom code and configurations developed by AVEVA are supported over your application lifecycle, providing any code investigation and fixes as required.
- **Solution Knowledge Management** – AVEVA understands the investment clients make in documenting their solutions and the value this documentation provides, especially over the lifecycle of a custom application. AVEVA will provide a centralized vault for code maintenance and document management. All changes to the solution will be reflected in the code and documentation with formal versioning and an audit trail which makes maintaining your application highly efficient.
- **Offline Application Clone Services** – AVEVA will maintain an “in-house” test application – a virtual instance of your production system – to facilitate and streamline delivery of engineering services and for offline troubleshooting, unit testing, upgrade assessment and training. This results in expedited issue resolution and greater confidence in the installation of software fixes as they have been tested on your application.
- **Upgrade Assessment and Services** – Over time, a solution's underlying products will mature and eventually require an upgrade. Other factors such as hardware, operating system or database version obsolescence/upgrades may also necessitate a need to upgrade AVEVA software to remain compatible. Solution Support Engineers can perform upgrade assessments to evaluate compatibility of the overall solution. Customer FIRST for Solutions may also include services for altering the customized part of the application to ensure the overall solution continues to function as designed after upgrading of the underlying product.
- **Solution Consulting Services** – Applications and their supporting infrastructure will change as your business grows, as technology advances, and as new ideas, concepts and processes develop. These services help IT manage changes related to (customized solutions') system architecture, application design, fixes, enhancements, upgrades, and drive consistent application performance over time.

- **Enhancements Services** – As business needs and IT infrastructure change, a software application may need to be updated and additional functionality developed. These services provide limited enhancements and changes to the custom code and also a team of engineers who can develop the required additional functionality and extend an application's value. (Note: Enhancements and new functionality/features may require a separate Statement of Work and purchase order.)



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