



# SUPPORT AND DEPLOYMENT SERVICES GUIDE

## CUSTOMER GUIDE

### WELCOME TO POLY GLOBAL SERVICES

Poly Global Services offers an extensive portfolio of industry leading professional and support-based services, each designed to meet your organization's most vital needs. Whether it is system planning, deployment, or ongoing support—our Poly experts can assist you with any aspect of your solution.

Your continued satisfaction is our primary concern. With Poly Global Services, expert support is a phone call away, no matter where in the world you are located. This Customer Guide to Poly Services delivers an overview of our major Poly services, and provides you a comprehensive Global Support Directory. The directory provides important information for your regional Poly Support Team, including parts replacement information. Please take note of the Regional Technical Support location nearest to you. We advise you keep this information, along with your product serial number in a convenient location. You will be asked for this information, should you a need to contact Poly Global Services via the telephone or online for support.

We are committed to providing consistent, world-class service to help ensure you get the most from your Poly solution. Please do not hesitate to contact your local Poly Technical Support Center or visit us online at [www.poly.com/collaboration-services](http://www.poly.com/collaboration-services) if you have additional questions about our services portfolio.

### POLY SUPPORT OFFERINGS SUMMARY

<u>SERVICE DELIVERABLES</u>	<u>PREMIER</u>	<u>ADVANTAGE</u>	<u>ELITE</u>	<u>REMOTE MONITORING AND MANAGEMENT</u>
Technical telephone support Monday through Friday from 9 AM to 5 PM excluding recognized Poly holidays	•			•
24x7 technical telephone support with priority access into Tier 2 support queue		•		•
24x7 technical support with assigned Remote Technical Support Engineer (RTSE) access 8x5			•	•
Advance parts replacement—next business day	•	•	•	•
Poly Online Support Center access	•	•	•	•
Software updates and upgrades	•	•	•	•
Technical escalation management	•	•	•	•
Non-technical escalation management			•	•
Multi-vendor support	•			•
Cloud Partner endpoint telephone support		•	•	•

<b><u>SERVICE DELIVERABLES</u></b>	<b><u>PREMIER</u></b>	<b><u>ADVANTAGE</u></b>	<b><u>ELITE</u></b>	<b><u>REMOTE MONITORING AND MANAGEMENT</u></b>
Monthly utilization reporting <sup>1</sup>		•	•	•
Bi-annual benchmark reporting <sup>1</sup>		•	•	•
Infrastructure asset tracking			•	•
Central storage of customer's environment			•	•
Software version availability and update notifications			•	•
Software version control			•	•
Provide access to MOPs (methods of procedure), release notes, issues			•	•
Root cause analysis			•	•
Next business day onsite support <sup>2</sup>	OPTIONAL	OPTIONAL	•	OPTIONAL
4-hour onsite response (includes replacement parts) <sup>3</sup>		OPTIONAL	OPTIONAL	OPTIONAL
Primary technical sponsor and point of contact			•	•
Program status updates at regularly scheduled business review meetings			•	•
Remote onboarding and annual review			•	•
Ensure compliance with standard processes, policies, and procedures			•	•
Document lessons learned and support continuous improvement			•	•
Report on service performance metrics			•	•
Report on service level objectives (SLOs) for service performance metrics			•	•
Maintain copy of customer network configuration			•	•
Business Relationship Manager	OPTIONAL	OPTIONAL	•	•
Remote Technical Support Engineer	OPTIONAL	OPTIONAL	•	•
Technical Account Management	OPTIONAL	OPTIONAL	OPTIONAL	
Business Critical Support	OPTIONAL	OPTIONAL		
Active and Passive monitoring				•
Proactive remediation				•
Event, Incident, Problem, Change, Configuration, and Capacity Management (with ITIL compliance)				•

<sup>1</sup> For customers that have supported products deployed that provide customer detail records.

<sup>2</sup> Next business day onsite support is available as an option to the Premier, Advantage, or ImmersiveCare service programs.

<sup>3</sup> 4-hour response is available for specific products and locations, as detailed on <http://support.poly.com>.

Remote Monitoring and Management—managed devices must be covered under Advantage or ImmersiveCare support that is coterminous with the Managed Services contract or extends beyond the term of the Managed Services contract.

## **OPTIONAL SUPPORT MODULES AVAILABLE**

### **BUSINESS CRITICAL SUPPORT**

Business Critical Support (BCS) is available to customers with an active Poly Service agreement. This program provides the highest level of response and resolution for customers seeking the maximum degree of video network performance. BCS augments features of the customer's active service agreement and the customer's IT organization by providing access to a specialized team of Poly technical, managerial, and administrative experts.

<b><u>SERVICE DELIVERABLES</u></b>	<b><u>BUSINESS CRITICAL SUPPORT</u></b>
24x7 access to BCS team with live transfer during standard business hours	•
Central storage of customer's environment	•
Software version and upgrade recommendations	•
Two prescheduled out-of-local business hours migrations per year	•
Escalation management with quarterly status calls	•
Infrastructure asset tracking	•
Joint vendor calls if required	•
Access to methods of procedure (MOPs), release notes, issues	•
Support portal	•
Next business day (NBD) onsite support <sup>1</sup>	OPTIONAL
4-hour response <sup>2</sup>	OPTIONAL

<sup>1</sup> Next business day support is available as an option to the Premier, Advantage, or ImmersiveCare Service Programs.

<sup>2</sup> 4-hour response is available for specific products and locations, as detailed on <http://support.poly.com>.

### **BUSINESS RELATIONSHIP MANAGEMENT**

Business Relationship Management (BRM) provides customers seeking post-implementation support to grow, manage, and optimize their Poly investment through virtual access to an assigned service management advocate. This industry-leading expertise can augment the customer's internal resources, maximizing return on investment with analysis and improvement recommendations, and aid in the improvement of the adoption and experience of the Poly solution.

This global value-added service option is available to customers that maintain an active Poly support agreement on their Poly solution. The BRM role does not replace Poly program managers, project managers, or any other roles that may be assigned to the customer for the implementation, installation, maintenance, or management of the Poly solution.

<b><u>SERVICE DELIVERABLES</u></b>	<b><u>DETAILS</u></b>
<b>Business Relationship Management</b>	Establish initial business objectives with customer during onboarding process
	Ensure service deliverables are met and facilitates regular program reviews
	Act as a customer advocate and single point of contact
<b>Continual Service Improvement Management</b>	Establish and provide regular program reviews based on agreed upon key performance indicators (KPIs)
	Benchmark and document an improvement process for adoption, capacity, utilization, availability, incident, problem, and change management <sup>1</sup>
<b>Service Level Management</b>	Establish service level metrics to be tracked across all services delivered
	Provide monthly service level reports

## **SERVICE DELIVERABLES**

## **DETAILS**

Capacity Management	Set goals, monitor, and report on capacity to meet future business needs
Asset Management (requires Poly infrastructure)	Establish, track, and report on all assets under management

<sup>1</sup> For customers that have supported products deployed that provide customer detail records.

## **REMOTE TECHNICAL SUPPORT ENGINEER**

Poly Remote Technical Support Engineer (RTSE) is assigned as part of a customized day 2 support program for customers seeking a closer technical relationship with Poly. The RTSE helps customers maintain their Poly solution and achieve their response and reliability goals when technical assistance is required. The RTSE has immediate access to the Poly knowledge base and is backed up by 24x7 remote expertise including tier three technical support, research and development, lab systems, and management escalation support to ensure a high level of support and response times.

The RTSE role does not replace Poly program managers, project managers, or any other roles that may be assigned to the customer for the implementation, installation, maintenance, or management of the Poly solution.

This value-added service option is available to customers that maintain active Poly Advantage Support, Business Critical Support, Elite Support, or have Poly Remote Monitoring and Management services on their Poly solution.

## **TECHNICAL ACCOUNT MANAGEMENT**

The Poly Technical Account Management program is a proactive, personalized support program for customers with mission critical Poly solutions seeking a consultative relationship with Poly. The goal is to help customers grow, manage, and optimize their Poly investment and achieve desired business outcomes. This global, value-added service option is only available to customers that maintain an active Poly support maintenance agreement on their entire Poly solution.

## **SERVICE DELIVERABLES**

## **TECHNICAL ACCOUNT MANAGEMENT**

Customer advocacy	•
Service program reviews	•
Software releases	•
Software configuration profile	•
Utilization analysis	•
Adoption and awareness	•
Asset management reporting	•
Service quality	•
Resource requirements planning and availability	•

## POLY VOICE SUPPORT SERVICES SUMMARY

<u>FEATURE COMPARISON</u>	<u>LIMITED LIFETIME HARDWARE REPLACEMENT—NEXT BUSINESS DAY</u>	<u>LIMITED LIFETIME HARDWARE REPLACEMENT —10-DAY RETURN TO FACTORY</u>	<u>TECHNICAL SUPPORT FOR ENDPOINTS—SITE BASED OR SERIALIZED ENTITLEMENT</u>
8x5 business hours	• Level 1 support only	• Level 1 support only	•
24x7			•
Software upgrades and updates			•
Advance parts replacement, next business day	•		
10-day return to factory		•	
Escalation support			•
Online support tools	•	•	•

## POLY PRODUCT DEPLOYMENT SERVICES SUMMARY

	<u>INSTALLATION AND TRAINING</u>	<u>IMPLEMENTATION</u>
Client expectation review		•
Pre-installation survey	•	•
Field engineer	•	•
Update of server software	Installed on shipped version	Recommended version from Project team
Installation of client software	One PC	As defined within project deliverables
Orientation session	Up to two hours per system	Up to four hours per system
Project manager		•
Technical specialist		•
Provide project documents		•
Full implementation readiness analysis		•
Progress reports		•
Customized test protocol		•
Provide welcome pack		•

## **HOW TO LOG A SERVICE REQUEST**

For technical assistance, please contact your local Poly Technical Support Center. You can submit a service request at [support.poly.com](https://support.poly.com) or by calling the relevant support number listed in the Global Support directory. In both cases, please be ready to provide your system's serial number.

The process defined on the next page is for Poly Branded Services. Please contact your Partner for support if you purchased a service from an Authorized Partner.

When you contact our call center your service request will be logged. All service requests are routed through our support process and escalated accordingly.

Note that our 24 hour, 7 days a week service offerings are delivered in English.

## **ESCALATION POLICY**

Our escalation process outlines how we respond to incidents reported to the Support Center. We prioritize the seriousness of each issue and provide specific resolutions accordingly.

In some instances, additional support is required and the case is escalated to Poly 'Escalation' Support. Triggers for escalating cases to the Escalation team may include one or more of the following:

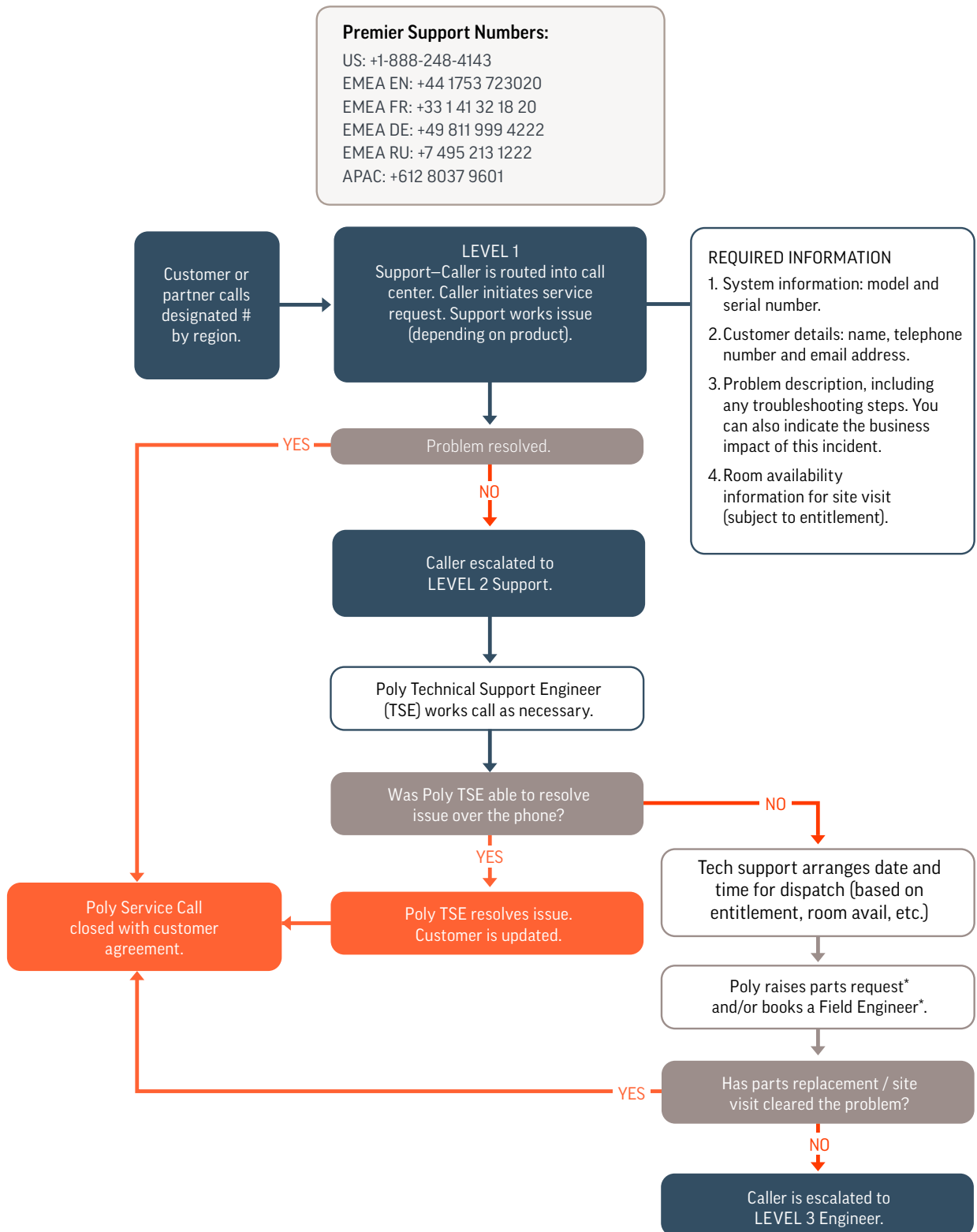
- Parts replacement does not resolve the problem
- A software bug has been identified
- No significant progress is being made to resolve the case
- Additional support is required due to the complex nature of the problem

Once escalated to the Escalation team, the assigned 'Escalations Engineer' maintains case ownership and works directly with the customer to resolve the issue.

## **CUSTOMER IMPACT SUMMARY**

Severity 1 (Critical)	Severity 2 (Major)	Severity 3 (Minor)
This Severity Level shall indicate a sizable, wide-spread failure of a Product or Service that causes the Product, Service or related production network to be inoperative and that this inability to use the Product or Service has a critical effect on the Customer's commercial operations. This severity level is generally characterized as a complete Product failure requiring immediate correction and for which no Workaround is immediately available.	This Severity Level shall indicate that the Product or Service is partially inoperable but is still usable by the Customer. The inoperative portion of the Product or Service severely restricts Customer's commercial operations but has a less critical effect than a Severity Level 1 condition does.	The Severity Level shall indicate that the Product or Service is usable with little or limited impact to the Customer and affects but does not severely restrict commercial operations. Any problem that does not impact the Customer's production network shall be categorized at a maximum of this level. Errors in user interfaces, documentation, spelling, and other textual exclusions which do not cause or restrict usability of the Products will be categorized at this level.

## **PREMIER SUPPORT CALL FLOW**



### Notes

\*Onsite visit arrangements and parts subject to entitlement.  
Entry conditions for Poly Technical Escalation are observed.

## ADVANTAGE SERVICE CALL FLOW

### Advantage Service Support Numbers

US: +1 844 250 7268

EMEA EN: +44 1753 723261

EMEA FR: +33 1 41 32 1800

EMEA DE: +49 811 999 4111

EMEA RU: +7 495 213 1211

APAC: +612 997 88098

Australia: +1 800 149 671

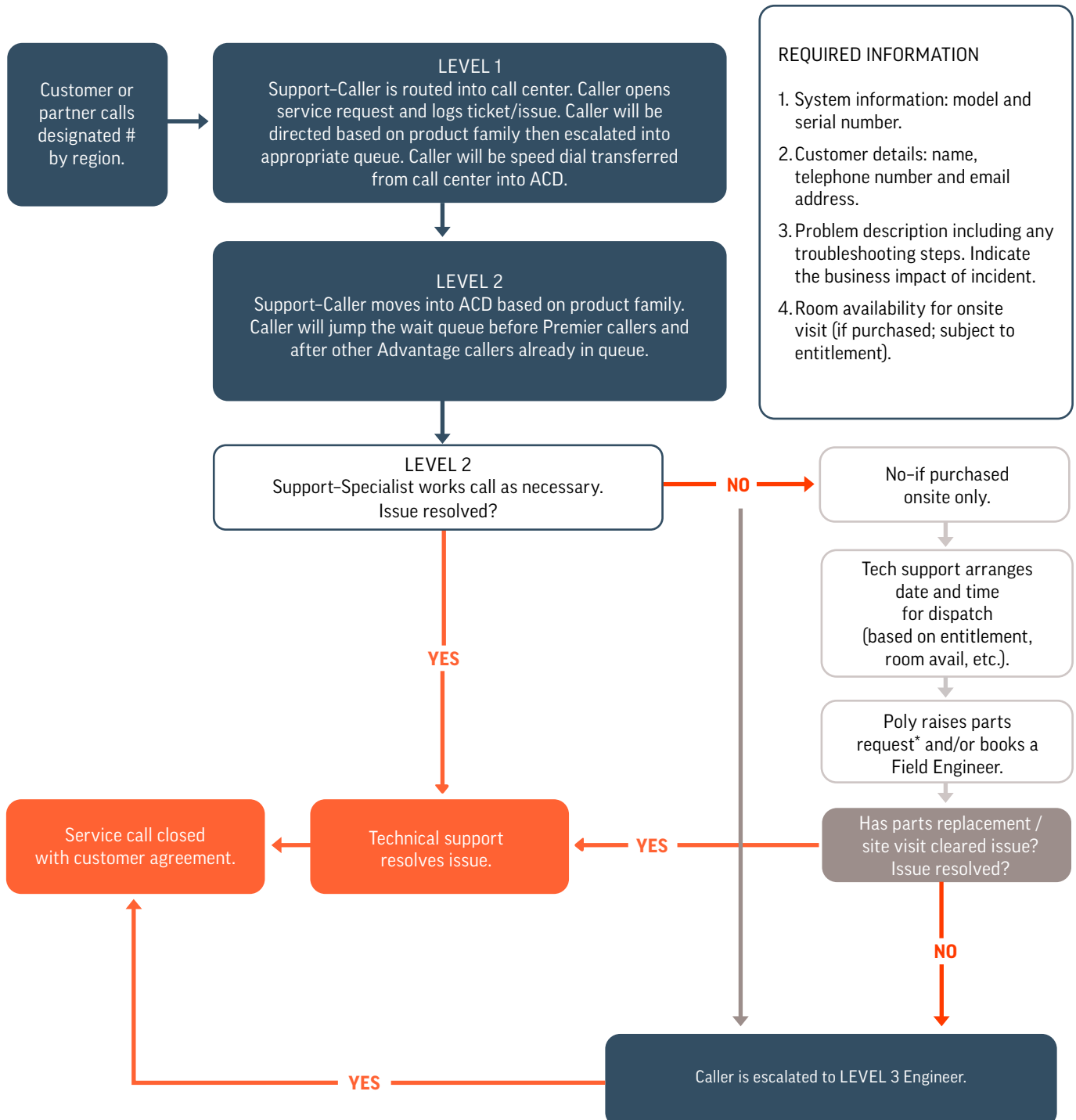
India: +1 800 610 1129

Malaysia: +1 800 817 454

Thailand: +1 800 611 4318

Mexico: +1 800 877 0150

Brazil: +1 800 761 7073



\*Onsite visit arrangements and parts subject to entitlement.



## **TECHNICAL SUPPORT CONTACT INFORMATION AND AVAILABILITY BY REGION**

### **PREMIER SUPPORT**

For products covered by the Premier Service Program, you will receive technical telephone support five days a week (excluding recognized Poly holidays) between 9AM and 5PM, local time. Poly support engineers will provide remote assistance in diagnosing, configuring, and troubleshooting.

### **ADVANTAGE SUPPORT**

Poly will provide a region-specific telephone number where available that allows you to receive telephone support for your Poly solution. Advantage service requests have priority access in the Tier 2 support queue. Such technical telephone support access will be available 24x7 per the Customer Impact Summary shown on page five.

Note that Poly technical support is delivered by the regional support team where your product is located.

### **NORTH AND SOUTH AMERICA**

<b>User location</b>	<b>Regional support number</b>	<b>Support language</b>
United States	1-888-248-4143	English, French, Spanish & Portuguese
Canada	1-888-248-4143	English & French
Argentina	0-800-666-2832	Spanish & English
Brazil	0-800-891-5786	English, French, Spanish & Portuguese
Chile	800-510-011	Spanish & English
Colombia	01-800-917-1911	Spanish & English
Mexico	01-800-283-2926	Spanish & English
Rest of Central & South America	+978-292-5516	English, French, Spanish & Portuguese

### **EUROPE, MIDDLE EAST AND AFRICA**

<b>User location</b>	<b>Regional support number</b>	<b>Support language</b>
France	+33-(0)-1-4132-1820	French & English
Germany, Austria, Switzerland	+49-(0)-89-262059-222	German & English
UK, Scandinavia, Rest of Europe, Middle East, Africa	+44-(0)-1753-723020	English
Russia	+7-495-213-1222	русский/ruskiyi & English

### **ASIA PACIFIC**

<b>User location</b>	<b>Regional support number</b>	<b>Support language</b>
Japan	0066-3361-2146	Japanese
South Korea	00-30-861-00-97	Korean
New Zealand	0800-507-856	English
India	+65-6389-9200 and +91-124-486-1662	English
Singapore	800-616-1958	English
Thailand	00-1-800-611-2919	English
Hong Kong	800-966-391	Mandarin & English
Indonesia	00-1-803-618-17	English
China Mainland	400-688-4868	Mandarin

## **ASIA PACIFIC**

User location	Regional support number	Support language
Australia	1800-725-598	English
Taiwan	008-0161-1449	Mandarin & English
Rest of Asia Pacific (Singapore time)	+65-6389-9200	English
Rest of Asia Pacific (Sydney time)	+61-2-9978-8098	English

## **DELIVERY GUIDELINES**

User location	Regional parts depot location	Deadline for same-day shipment of replacement parts*
United States	United States	6:00 pm Eastern time
Canada	Canada	6:00 pm Eastern time
Brazil	Brazil	3:00 pm Sao Paulo time
Chile	Santiago	2:00 pm Santiago time
Colombia	Bogota	6:00 pm Bogota time
Mexico	Mexico City	4:00 pm Mexico City time
Rest of Central & South America	United States	6:00 pm Eastern time
France	Netherlands	4:00 pm Central European time
Germany	Netherlands	4:00 pm Central European time
South Africa	Johannesburg	3:00 pm South Africa time
UK, Rest of Europe, Middle East and Africa	Netherlands	3:00 pm UK time
Japan	Tokyo	3:00 pm Tokyo time
New Zealand	Sydney	3:00 pm Sydney time
India	New Delhi	3:00 pm New Delhi time
Singapore	Singapore	3:00 pm Singapore time
Thailand	Singapore	3:00 pm Singapore time
Hong Kong	Singapore	3:00 pm Singapore time
Indonesia	Singapore	3:00 pm Singapore time
China	Beijing	4:00 pm Beijing time
Australia	Sydney	3:00 pm Sydney time
Taiwan	Singapore	3:00 pm Singapore time
Rest of Asia-Pacific region	Singapore	3:00 pm Singapore time

All field engineer (FE) requests will be supported during standard 8x5 business hours, including parts replacement and FE onsite arrival. For example, if a Return Materials Authorization (RMA) and SVO is created on Monday, the part and the FE will arrive during the next business day. The deadline for same day processing is generally 3 pm local time to Poly's regional parts depot.

CRT, LCD and plasma displays require two business days for RMA processing. All other RMA transactions will be processed by Poly and express shipped same-day when the order is placed before the specified time. Actual arrival time of replacement part may be delayed due to customs or other local conditions.

## SERVICE CHARGES MATRIX

The following matrix below shows when the Courier or Tax and duties fees are the responsibility of Poly or the Customer.

Shipping terms and transit times may be found at:

<https://support.polycom.com/content/support/service-policies/advparreplacements.html>\*

### NORTH AMERICA, APAC, EMEA

#### Service charges matrix for RMA process—what is included

Situation	Service level	Courier part outbound	Courier part inbound	Tax & duties outbound	Tax & duties inbound
DOA	Advance exchange	Yes	Yes	Yes	Yes
Maintenance contract	Advance exchange	Yes	Yes	No	Yes
In warranty	Return to factory repair	Yes	No	No	Yes
Out of warranty/chargeable	Return to factory repair	Yes	No	No	Yes
Out of warranty/chargeable	Advance exchange	Yes	Yes	No	Yes

### POLY GLOBAL SERVICES USEFUL LINKS

Worldwide terms and conditions

<https://www.polycom.com/products-services/services/services-terms-and-conditions.html>

\*Only applies to customers who have purchased Advanced Parts Replacement

## CLOUD SERVICES ONLINE SUPPORT POLY REALCONNECT FOR OFFICE 365

Poly RealConnect for Office 365 is a cloud-based video interoperability solution built for Microsoft Office 365.

To access the Support Page go to: <http://cloudsupport.polycom.com/services/>

To solve your product inquiries please visit our [Knowledge Base](#).

If you work directly with Poly, open an [Online Service Request](#).

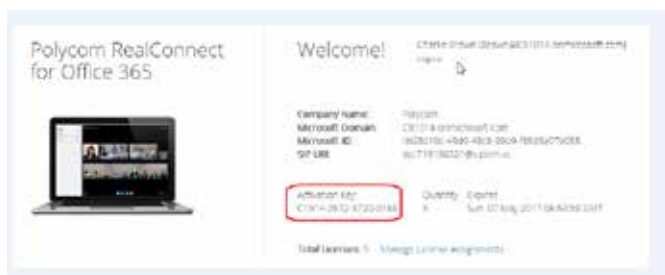
You must first register your Poly product online before the serial number is available against a Service Request (SR).

Your activation key acts like a Serial Number for your product. When contacting Poly Support, you should have this number available. Once you locate this number, record it for future reference.

This can be found two ways:

1. The original licensing Email that was sent to the primary account member contains the activation key.
2. Run the Poly licensing application again (webapp.plcm.vc)

Log in with admin credentials and it will display the Activation key.



Our Technical Support Team will review your request and open a RMA on your behalf, if required.

## **STEPS TO OPEN A WEB (SR)**

1. In a web browser, navigate to  
<https://cloudsupport.poly.com/services>
2. Prior to opening a Web SR:
  - a. Browse the resources provided on the site–Documentation, FAQs, How-To's
  - b. [View RealConnect for Office 365 Service Status](#) to check if there is a known impact to one of the Cloud services
3. Click the “Service Requests” tab on the top toolbar
4. Login using your support.Poly.com account or register for an account if needed
5. View the status of an existing Web SR or “Create New Service Request”
6. Please review “[What information is needed to open a Service Request for RealConnect for Office 365](#)”

Support on out of warranty or out of contract products and issues may be charged.

## **TECHNICAL SUPPORT OR REPAIR SERVICES BY PHONE**

Region	Country	Telephone	Language
North America	United States and Canada	1-844-513-9278 or +1-864-568-7028	English
EMEA	U.K.	+44 1753 723314	English
	France	+33 141321801	French
	Germany	+49 8119994104	German

## **INSTRUCTIONS FOR CDR RETRIEVAL AND UTILIZATION REPORT REQUEST (WEB SERVICE REQUEST)**

Poly will provide monthly Utilization Reports and biannual Benchmark Reports to Advantage Service customers. These standardized reports will be based on the “Endpoint Usage Report” as provided by you from your Poly Resource Manager system for the previous month. The Utilization Reports will summarize the total number of calls and minutes as well as utilization statistics for each Poly endpoint registered to the Poly Resource Manager for which Customer Detail Records (CDRs) are available from the previous month. The Benchmark Reports focus on key metrics that are benchmarked against other corporations that utilize video as part of their collaboration strategy.

The Advantage Service Utilization Report is based on Call Detail Records (CDRs) collected by the Resource Manager system. Full instructions on how to complete the CDR Retrieval and Utilization report request are available <https://support.polycom.com/content/dam/polycom-support/global/portal/welcome-letters/advantage-service-utilization-benchmark-instructions-quick-reference-guide-enus.pdf>