tikit

Support Services Guide

Taking you to tomorrow

Important Information

Tikit is a leading provider of innovative and specialist technology to the Legal and Professional services sector with over 1500 law firm clients globally and is part of BT Group. Tikit develops its own software including Partner for Windows (P4W), Carpe Diem, Template Management System (TMS) and eMarketing. This is complemented by long-standing partner relationships with other top best-of-breed providers to create innovative and complete solutions for its clients. This is matched with a commitment to and reputation for excellent customer service across consulting, implementation and support.

Errors and Omissions

While every effort has been made to ensure that all the information in this document is correct, Tikit reserve the right to correct any errors or omissions at any time.

Copyright

Company: Tikit

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Contact: Miles Osborne, Head of Global Support: miles.osborne@tikit.com
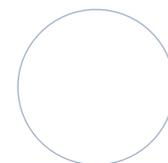
Versions

Version	Date	Author
2	August 18	Tikit/BP

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Support Services Guide

Introduction

Tikit is committed to continually improving the support service to best suit the needs of our clients. This document forms part of that process and we recommend that you read this guide to get the best from the support service.

We hope that it will enable you to understand the services that Tikit Support can provide and the procedures we follow. Your understanding of these processes will improve the service we offer and you receive.

We are always striving to improve the service we offer you so we are grateful for any suggestions or comments you may wish to offer. Please feel free to contact us at helpdesk@tikit.com

Certifications

As part of our ongoing commitment to providing customer service excellence, Tikit is proud to hold accreditations and memberships with globally recognised service driven organisations. These affiliations ensure that we remain at the forefront of industry best practices and allow us to cultivate our philosophy of continuous improvement.

ISO 9001

Tikit's Support team has held ISO 9001 certification since 2009. This internationally recognised standard is used by Tikit as a method of controlling our Quality Management Procedures. It provides a framework which enables us to manage our department efficiently and effectively.

ISO 9001 is based on eight quality management principles including Customer Focus, Leadership, Process Approach, Fact Based Decision Making and Continual Improvement.

Our procedures are externally audited each year to ensure that these practices are maintained.

Service Desk Institute

In 2016, Tikit became Gold Members of the Service Desk Institute (SDI). SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery.

Contact details

Tikit Product Support:

UK Telephone: 0800 6893 923
North America Telephone: 1-888 878 4548
International Telephone: +44 207 859 4928

Email Address: helpdesk@tikit.com
Support Portal Address: http://helpdesk.tikit.com

Office addresses

Head office (London)

Tikit Limited
BT Faraday House
Knightrider Street
London
EC4V 5BT
T: +44 20 7400 3737
E: info@tikit.com
W: www.tikit.com

Fareham office

1590 Parkway
Solent Business Park
Fareham
Hampshire
PO15 7AG
T: +44 1489 609010
E: enquiries@tikit.com

Montreal Office

324 de Castelnau Street East
PO Box 52508
Montreal
Quebec
H2R 1P7
T: +1 888 878 4548
E: info@tikit.com

The Support Service

What You Can Expect from the Support Service Software

Updates Software upgrades for Tikit's own software are normally provided as part of the support agreement. Upgrades may be chargeable when related to statutory or regulatory changes enforced by official bodies. Upgrade files will usually be provided on the Client Portal and where this is the case customers are expected to carry out their own upgrades; however, this is a service that Tikit can provide. If you require assistance with the installation or specific training then this would be referred to our consultancy teams to provide a quote.

Support Hours

Please refer to page 8 of this guide for Tikit's SLA guidelines. Response time is usually counted between 9am and 5.30pm unless you have an enhanced contract. Flexibility can be offered on the standard response time and should be discussed with your Account Manager.

Remote Access

Tikit use a product called GoToAssist which allows the support analyst to connect to most PCs as long as the SSL port on the network is not blocked. After connection has completed the software automatically uninstalls itself. By mutual arrangement we can connect via other means such as remote desktop.

Data Protection

Tikit adhere to a strict policy when we receive or use client data. A completed Consent Form is required for approval before data is requested. All data received will be logged and tracked on our data register. Once the data has been extracted, the data will either be returned, destroyed or deleted. We return all tapes, external hard drives and memory sticks via Royal Mail Recorded Delivery. Any CDs or DVDs are destroyed. When we have finished with the data, it is deleted from our servers.

For more information on our Data Protection policy, please view the 'Tikit Policy for Handling Customer Data' within the Release Guides section of the Client Portal.

What is not covered by the support service

Training

The support service can never be a substitute for proper and professional training on Tikit's products or any other hardware or software product you may use. Where the need for training is clearly identified, we will suggest that additional training is required and what that training should consist of. For example, if a new cashier joins a practice and has never used our products before and they are now logging calls as a substitute for full training. The Support department reserves the right to discontinue any calls in relation to pure training issues that we have previously identified if suitable training is not addressed within a reasonable timescale. We will, under agreed circumstances continue to assist with the call, but it will be on a chargeable basis and will be treated as a lower priority than a standard support call. This will be confirmed in writing at the time. For further information on our training courses please contact your Account Manager.

System Reviews

It is recommended that you periodically review your current hardware and software requirements with a member of the Sales team. This is not a normal support function, although a member of the support team may make a recommendation in the process of dealing with your call.

System Administration

General day-to-day system administration of your system is not covered by the support agreement and having a support agreement should not be used for cost savings in the form of system administration/administrator costs.

You should always ensure that your administrator(s) are sufficiently trained on all your systems to be able to provide you with the appropriate amount of system administration.

General system administration must always include:

- Ensuring your system is correctly specified for the purpose

- The system has enough available free hard disk space

- Ensuring you adhere to a regular and validated backup regime

- Ensuring equipment is kept in a serviceable state

Other system administration functions may include:

- Adding users

- Administering printers

- Restoring from tape

- Working with other third parties such as Internet Service Providers (ISP's)

Issues caused by Installation of 3rd Party Products

In an ever more technical world the variety of applications and their interaction with each other is becoming more complex. If you have a 3rd party product that needs installing on your system then a suitably qualified engineer must do this work. In the event that this is not done correctly, any resulting damage caused by the product will not be covered by the maintenance agreement and would be chargeable to rectify.

Damage caused by Customer or 3rd Party Interference

If the user causes the damage by accident or neglect, it would not be covered by the normal support agreement. If a repair is possible it would be handled on a chargeable basis. Similarly, if a fault occurs due to interference by a 3rd Party then this may also be deemed chargeable to repair.

Out of Hours Support

If you require work to be done outside our normal support hours then we can undertake this work on a chargeable basis. An example of this would be providing support or assistance on an upgrade. A quotation will be provided in advance.

This service needs to be pre-arranged as we require a skilled analyst to be available for the duration of the call. Please try to give us as much notice as possible if Out of Hours support is required.

Statutory Regulations

The support department are not able to provide specific advice, training or express opinions regarding the interpretation of matters relating to statutory regulations issued by Government departments, or rules set out by official bodies.

Maintenance of Partner for Windows Time Recording Rates

The rates at which chargeable time is recorded within Partner for Windows are often subject to change, especially if Publically Funded work is being undertaken, as the Legal Aid Agency (LAA) frequently amend their schemes, fees and rates.

It is the responsibility of the Practice, and not Tikit, to ensure that the rates being used are current and correct at all times. If assistance is required to amend a rate please contact the Support Team who will be able to instruct you on the process to achieve this. Training or consultancy time can be purchased if you require bulk amendments or additions to your time recording rates. This can be arranged through your Account Manager.

Tikit cannot advise on the values which rates should take and we would recommend that if rate amounts are unknown or unclear in the case of Publically Funded work, then the Practice should contact the LAA for advice and guidance.

Service level agreement

Tikit will provide the Customer with Standard Service, and such Support and Maintenance Services will be provided to the nominated Customer employees or agents that have received the necessary level of training, as defined by Tikit. In addition, Tikit 24/7 Service is available on applicable products defined below, and only on a case by case basis, as agreed between the parties and set out in this Agreement.

Each product purchased by the Customer under this Agreement will clearly indicate which Service has been subscribed to, and this will be detailed on the Schedule or Order Form. Where a Service has not been defined, the service provided for that product will be Standard Service.

Tikit Standard Service

Hours	9:00am to 5:30pm	
Response Time	Priority 1	2 Hours
	Priority 2	8 Hours
	Priority 3	8 Hours
Public Holiday Cover /Weekend Cover	No	
Priority Level Dealt With	1, 2 and 3	
Products Applicable	Carpe Diem, EMS, TMS, P4W, NetDocuments	

Tikit 24/7 Service*

Hours	Outside of standard support hours	
Response Time	Priority 1 Only	1 Hour
Public Holiday Cover	Yes, excluding Christmas/Boxing Day and Easter Bank Holidays	
Priority Level Dealt with	1	
Products Applicable	Carpe Diem, NetDocuments	

* Available for an additional fee, please contact your Account Manager for further information

Priority 1	Critical fault, software has completely failed
Priority 2	Less Critical fault, software is working but at a reduced performance level
Priority 3	Calls affecting individual users or non-critical fault

Software Fault Priority Codes

If an issue is identified in Support as a software fault it will be passed to the Development Department as an SIR (Software Incident Report). The following table shows the software fault type and our expected rectification timescales.

Type	Fault Type	Timescales
1	Software faults with no work around, which are badly affecting the system functionality or data integrity. The fault won't have normally existed in previous versions.	Will be fixed within the next 10 working days, in Tikit's current released version of Partner for Windows. The patch will be issued to the customer, and may also be publically released. We would always hope to better these timescales, particularly when the issue is of a serious nature.
2	Software faults where an appropriate workaround cannot be found, but does not warrant an urgent P1 Resolution. The fault is deemed as not having a material impact on to the system or integrity of the data. In most cases the fault didn't exist in previous versions.	This would normally be fixed in the next main release or scheduled service release of Partner for Windows. No patch will be issued for the current version. The Support call will be left open.
3	Software faults which are non-urgent and have a reasonable workaround or that have minor functional impact on the product.	At the point of accepting the fault as an SIR an expected version number will be provided. No patch will be issued for the current version. The Support call will be left open.
4	Approved product enhancements.	Approved for inclusion into a future release however there will be no commitment on timescales for resolution. No patch will be issued for the current version. The Support call will be closed.
5	Enhancement requests or cosmetic changes which have not yet been reviewed or approved.	No timescales or commitment for resolution will be given at the point of logging the request. The Support call will be closed.
8	Software fault which has minimal impact on user experience	No commitment on timescales for resolution will be given. Clients should generally have no expectation that the issue will ever be resolved. The Support call will be closed.
9	Enhancement or low impact software issue with no intention to resolve.	No software change will be made. No further action would normally be taken for this log. The Support call will be closed.

Contacting the Support Department

Before You Log a New Incident

It is important that you have all the necessary information available before you log a new support call. We will specifically need from you the following:

• Practice Name and a Contact Name of the person that we need to speak to

• Best telephone number for contacting you

• The specific product that has failed

• How many people are affected by the issue

• One line summary of the issue

• Detailed description of the query including details of any error messages.

When reporting problems it is important to bear in mind that the Support Analyst may ask for supporting documentation. This could be copies of reports, log files or templates. It is therefore important to have these ready so that they can be sent electronically to us.

You should also check to see that the item is supported before logging a call. If it is not, you should discuss it with your Account Manager to see how the issue can be progressed.

Logging a new Support Incident

We offer a number of ways in which a new problem can be reported to us, as detailed below. Our preference is for incidents to be logged via the Client Portal.

You should always obtain a call number for all new incidents logged for your own reference. Until this reference has been received you should assume the incident has not been logged on our system. On raising an incident with the Support team you will receive email notification from helpdesk@tikit.com confirming the incident details and advising the call reference number.

Please remember that when logging a new support incident we will require specific information, as detailed in the previous section. When a support analyst responds to your call the more detailed information you are able to provide, the quicker they will usually be able to diagnose the cause of the problem.

When an incident is logged it is allocated to the team that handles that product. Incidents are placed in a queue and are prioritised according to the severity of the issue and the age of the incident. In other words, the oldest incidents on the queue will get responded to first except when a high priority issue is logged.

All methods of call logging receive the same priority. Incoming phone calls are not prioritised over emails or incidents logged via the Client Portal.

Client Portal – http://helpdesk.tikit.com

Client Portal is an Internet application that enables you to take advantage of some of the features and functionality of our Support database using only a web browser.

The Client Portal requires no software to be pre-loaded other than a standard Internet browser, which is normally installed by default as part of the Microsoft Windows desktop operating system. You will, of course need a connection to the Internet.

The Client Portal can be used to add, view and modify the following key information in our main Support database:

• New support calls (Known as incidents)

• Update support call information

• Enhancement logging and voting on existing enhancements

• Access to Tikit's latest manuals and documentation

• Ability to search Tikit's comprehensive knowledgebase

• Obtain the latest Tikit Software updates

• Access to the Tikit customer forum

Before you can use the Client Portal you will need a unique username and password. This is issued by the Support department so please email helpdesk@tikit.com with your full name and email address if you would like an account created.

Please note that Portal accounts are created on an individual basis so we are unable to create generic or department/company that are shared between users.

Email

Emails should be sent to helpdesk@tikit.com. The format of the email should be:-

Subject Line - Brief one line synopsis of problem

Body Text - Full description of problem. Please include as much information as possible (what you were doing, full error messages, number of affected users). If possible include a screen capture of any error messages.

Once the incident has been logged, confirmation of the incident and the incident reference number will be emailed back to you. Please keep a record of your incident references so that they can be referred to as necessary. If you do not receive a reference number you should assume we have not received your email.

Please do not include more than one issue per e-mail.

Telephone

Incidents can be logged by telephone using the following numbers:

0800 6893 923 (UK)

1-888 878 4548 (North America)

+44 207 859 4928 (International)

We have an auto attendant service on the support lines that will be automatically answered after four rings. You will then be placed in an automated queue that will route you through to the first available operator.

It is helpful if you have any supporting documentation and error messages readily available as you may be asked by the Support operative who answers the call. Please note that it is unlikely that your query will be answered by the person who logs your call. It is our normal practice to record the details of your query and pass it to the appropriate team to call you back.

If you or your practice is unable to work you should clearly indicate this. You will then be given an incident reference number. This should be quoted whenever you call Support with regard to the current incident

The Response to a Support Call

Once your call has been received a priority will be allocated. We will respond to it as per our Service Level Agreement on page 8.

When responding by email or telephone the Support Analyst may quote the incident number they are dealing with. If it is particularly busy, the Helpdesk Admin team may assist the Support staff by calling back for more information (under direction from the team leaders) or to give you an update on how quickly the Support staff will be able to contact you.

All updates made by the Support analyst to the call will also be emailed to the incident contact.

We always treat customers who are completely unable to work across the whole site as the highest priority. These calls take precedence over all other calls.

Knowledge Base Articles (KBA)

Knowledge Base Articles are documented step-by-step procedures that the Support department issue to instruct clients how to resolve the query or issue. If the Support department issue a KBA in response to your query, you should read the whole document carefully before making any changes to your system or taking any further action. It is also recommended that you search our Knowledge Base section on the Client Portal before logging a new support call.

We are constantly looking to increase the number of KBA's on the system and will continue to develop and expand their use to cover all Tikit products.

Checking the Progress of an Incident

If you wish to check on the progress of a call, the incident can be fully viewed via the Client Portal.

Closing a Support Incident

When the issue has been resolved you be informed that the incident will now be closed. This will be confirmed via email notification.

In the first instance, resolved issues are marked as Resolved. You will be sent an email once this status has been selected and the call will remain active on our system for a further 5 days. In the event that it is determined the issue is still not resolved, the call can be re-opened by emailing helpdesk@tikit.com. If you feel that the call should not be resolved please reply to the email notification giving your reasons and request that the call is left open.

After the 5 day period if no contact has been made the call will be closed automatically. We may also close calls where we have tried to make contact with someone unsuccessfully or have had no response for a period of 7 days or more. Calls that are closed can still be re-opened but only via the helpdesk, not via the Portal.

Once an incident has been closed you will be emailed a survey invitation. This gives you the opportunity to provide us feedback on how your issue was handled. Further information on our survey process can be found on page 14.

Call Escalation

We would like all customers to be totally satisfied with the support service. There may be times when it could be necessary to escalate a call if you are not happy with the way your incident is dealt with.

We have listed below some reasons why you may wish to escalate a call and the route you should follow:

Initial First Response Too Slow

If a response exceeds the response stated in the SLA:

i. Inform the Helpdesk Admin team that you are not satisfied with the response for the incident so far. If you believe the priority is incorrect you should give reasons why it should be given a higher priority. If you are still unhappy, a member of the Support Management team will be informed so a judgement can be made on the call. The Helpdesk Admin team will then give you a time when support will call you back.

ii. If contact is still not received in the agreed time frame, you should advise the Helpdesk Admin team. If possible they will put you straight through to a Support Analyst or if not, your call will be made the next one on the analyst's list.

iii. In the unlikely event that you have still not been responded to, please ask to speak to a member of the Support Management team. They will investigate your call and ensure the issue is expedited.

Please note that in the majority of occurrences, the Helpdesk Admin team will be monitoring the calls and will be chasing on your behalf.

Not Happy With the Resolution Presented

In the event that you are not happy that the call is being closed, in the first instance ask that the Team Leader investigate the call. They will look at the call and let you know if they are in agreement with the resolution.

If you are still dissatisfied with the resolution, then the call should be referred to the Support Management team. The incident will be reviewed again and you will be informed of the justification for closing the call.

Not Satisfied With the Call Handling

If you are not happy with the manner in which a support call has been handled then please advise the Helpdesk Admin team immediately. They will work with the team leaders to ensure the matter is progressed efficiently.   If you are still unhappy with the outcome of the call then please contact the Support Management team.

Lodging a Formal Complaint

If you wish to lodge a formal complaint, you should contact a member of the Support Management team. It is preferable for complaints to be submitted in writing by either email to helpdesk@tikit.com or by letter to the Fareham office.

Upon receipt, the Deputy Support Manager will record the issue in our Complaints Register and allocate it to the appropriate member of the Management team for reviewing. The reviewer will acknowledge receipt of your complaint and investigate it. You will be kept informed of progress until a satisfactory resolution has been found.

Support Logs Referred to Development

Software Fault

If an issue is deemed a fault with the software, the call will be passed to the Development Team for correction. Although the Development team deals with the call, the progress of the issue should be checked through the Support Helpdesk. Depending on the severity of the issue, Development will endeavour to commit to resolving the fault within a structured release timeframe. Once a fix has been released in a new version of software, we will email the client to advise them of this.

Please see page 9 for a breakdown of our Software Fault Priority codes.

Enhancement

If an issue is deemed to be a product enhancement the request will be passed to Development for consideration into a future release. You will be informed of this and the call will be closed. We are unable to guarantee that any enhancement will be implemented nor are we able to give any timescales for inclusion. Partner for Windows enhancements are documented in the Release Notes that accompany each new release of Partner for Windows.

Please see page 9 for a breakdown of our Enhancement Priority codes.

Customer Services

Client Satisfaction Survey

Every closed Support Incident receives an invitation to complete our Client Satisfaction Survey. The results are treated very seriously and are plotted to give us rolling monthly satisfaction ratings.

Each response is read, and feedback is responded to by either the Deputy Support Manager or Head of Global IP Support.   Your feedback and comments allow us to understand when we have done well and, more importantly, where we can continue to improve. All positive feedback is passed directly to the analyst responsible for the call so they are aware of the appreciation.

To fall in line with industry standards our overall satisfaction answer has been amended to a 10 point Net Promoter Score to calculate our monthly satisfaction ratings.

In previous surveys we adopted a scale of 'Exceeded Expectation' and 'Achieved Expectation'. Based on the new scoring scale, if the service provided has exceeded your expectation this is equivalent to a score of 9 or 10. For achieved service the rating would be a 6, 7 or 8.

We take great pride in the service we provide so if you receive a survey invitation from us we would very much appreciate your time to complete it. Please note that you will only receive one survey invitation per calendar month.

Changes to Client Details

If you have changed your practice address or any of your contact details please let us know as soon as possible. You can notify us via email helpdesk@tikit.com or by post to the Fareham Head Office address.

It is also helpful if you can advise helpdesk@tikit.com when a user leaves the practice so that we can update our records and ensure that any Client Portal logins are disabled.

Other Services

In addition to the Support Services detailed in this guide, Tikit offers a full range of consultancy and training services. This can range from writing a report, tasks or mailshots, implementation of new products or advising on the restructuring of your Nominal or Purchase Ledger.

All of our consultants have many years of experience in the legal industry and may have worked in private practice or been involved in the design of several generations of specialist legal software.

For more information please contact your Account Manager.

Frequently Asked Questions

The following section details issues that we frequently receive and includes the possible solution where relevant. They may seem obvious in some cases; but it is still worth checking before logging a new Support Incident.

• If you have a 'one off' issue that has not re-occurred and you did not record any error messages, it is almost certain that we will be unable to diagnose the issue and we'll be unable to proceed with the call if the machine is now running correctly.

• Before logging any Accounts reconciliation issues, it is essential that you have cross checked all relevant accounts/ledgers and the period that is affected.

• http://www.tikit.com is the main Tikit website. North American clients can access the website through http://www.tikit.us for a localised experience. If you have any suggestions or need information on how to access either website please email marketing@tikit.com

• If you are logging an incident regarding an application it is always worth checking the Release Guides or Knowledge Base articles to see if the issue has already been documented. All manuals can be obtained from the Release Guides section of the Client Portal.

• You should carefully check your Software Schedule at each renewal to ensure that you are sufficiently covered. Our Contracts team can always provide quotations for additional cover if required.

• To find out your Account Manager please contact the Sales Team in the relevant region — Fareham (Partner for Windows Clients) 01489 609010

London (UK & European Carpe Diem, eMarketing & TMS Clients) 0207 400 3737

North America +1 888 878 4548

Asia Pacific +61 (0)2 9269 1000

Useful Websites

Tikit

https://www.tikit.com

https://www.tikit.us

http://helpdesk.tikit.com

http://helpdesk.tikit.com/remote

HM Revenue & Customs

https://www.gov.uk/government/organisations/hm-revenue-customs

Legal Aid Agency

https://www.gov.uk/government/organisations/legal-aid-agency

Ministry of Justice Department

https://www.gov.uk/government/organisations/ministry-of-justice

Courts Service

https://www.gov.uk/government/organisations/hm-courts-and-tribunals-service

The Home Office

https://www.gov.uk/government/organisations/home-office

Solicitors Regulation Authority

https://www.sra.org.uk

Support Structure

Miles Osborne
Head of Global Support

Asia Pacific
- Tristan Unkovich — Customer Service Manager APAC

North America (Operational Responsibility)
- Pat Fiorino — Software Support Analyst
- John Pantorno — Software Support Analyst
- Baharez Ghanbari — Software Support Analyst

Accounts & Carpe Diem
- Hayley Biddlecombe — Accounts & Carpe Diem Support Manager
  - Paul Terry — Senior Support Analyst
  - Lee Stainer — Senior Support Analyst
  - Joshua Race — Accounts Support Analyst
  - Chris Overend — Accounts Support Analyst
  - Wendy Taylor — Accounts Support Analyst

P4W Apps
- Vini Pathmanathan — Junior Business Admin
- Marcus Fletcher — Junior Support Analyst

Specialist Team (EMS & TMS)
- Becky Patterson — Mid-Market Support Manager
  - Lucy Weaving — Senior Support Analyst
  - Conor Ashford — Apps Support Analyst
  - Yanna Antoniou — Apps Support Analyst
  - Ryan Joss — Apps Support Analyst
- Reuben Manning — Specialist Support Manager
  - Daniel Woods — Senior Support Analyst
  - Josh Court — Apps Support Analyst
  - Thomas Daykin — Apps Support Analyst
  - Lydia Morris — Apps Support Analyst
  - David Hagley — Apps Support Analyst

Technical
- Alan Baker — Tech Support Analyst
- Mark Lawrence — Tech Support Analyst

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Contact

Web www.tikit.com

🐦 @TikitGroup/@TikitNA/@TikitP4W

in Tikit