



LISACare Program Guide

Support and Maintenance Resources Available to LISA Customers

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Welcome.

Since 1988, Lisa Technologies Inc. (LISA) has provided solutions to automate supply chain, asset and customer relationship management processes in the building products industry.

LISA is committed to providing its customers with solutions that feature innovative technology, which increase productivity and provide unparalleled performance.

Critical to delivering on this commitment is helping our clients achieve the most benefit from LISA software. LISACare is one way in which we plan to do that moving forward.

We know that success means not only developing excellent software, but also providing the services and resources necessary for our customers to support and maintain their investment in LISA software. This means being flexible and adaptable with our product and service offerings in recognizing organizations will have different expectations and needs.

Ensuring our systems remain useful and will continue to provide excellent value over time is what LISACare is all about.

Jason Dudar
President, Lisa Technologies Inc.

About This Guide

As a LISA client and participant in our LISACare program, you have access to a wide range of resources designed to help you leverage your investment in LISA software. This guide describes the resources available to you as part of “Support and Maintenance”.

We strive to provide you with excellent service and we want you to know what to expect when you do business with us. The *LISACare Program Guide* introduces you to the benefits of “support and maintenance”, which include self-help resources, telephone support, product upgrades, and other value-added services we provide. This document also explains our customer support procedures, service level goals, and scope of support. We encourage every LISA software user to read this document and not hesitate to contact us if you may have any questions.

LISACare Support and Maintenance Renewal

To ensure appropriate levels of service for all our clients, we offer two plans: LISACare and LISACare Plus. These are outlined in a document which can be downloaded from our website. Look for: *The LISACare Support and Maintenance Program*.

LISA customers subscribe to one of two LISACare programs through a Support and Maintenance Agreement (SMA). This only needs to be done once. The agreement can be renewed annually.

We strongly recommend that customers continuously renew their SMA coverage because it will provide them with unbroken access to all new releases and versions of their covered LISA software, as well as to LISA’s technical support staff and other resources. The cost of renewing an SMA after it has lapsed is greater than keeping current.

Customers will be notified of a pending SMA renewal approximately 60 days before the anniversary date. Renewal will ensure that LISACare coverage is not interrupted, and the customer avoids the additional cost of having to buy "Software Maintenance Reinstatement" a requirement if the SMA coverage lapses and needs to be re-established.

LISA reserves the right to upgrade and enhance the LISACare Program at any time. If we make material changes to our policies, we will advise our customers in writing.

Customer Support Access

LISA Products and Versions

The following are the names of LISA software products:

- LISA Classic
- LISA C2
- LISA98
- LISA2003

Each of these products is at a different version number. Please check our website to determine the most current release version. Go to www.lisatech.com/support

How to Contact Customer Support

Below are the various ways to contact the LISA Customer Support Desk.

Telephone

604-207-1363

Fax

604-207-1225

Email

General support inquiries may be forwarded to:

assist@lisalumber.com

Technical support inquiries may be forwarded to:

tech-support@lisalumber.com

Support Hours

Support is available 8:00 A.M. to 5 P.M. PT, Monday through Friday, excluding holidays. Peak time periods, when the volume of incoming requests is heaviest, vary.

Holidays

LISA's Canadian office, including Customer Support, is closed on:

New Year's Day (January 1)

Easter Monday (varies in March or April)

Victoria Day (third Monday in May)

Canada Day (July 1)
B.C. Day (first Monday in August)
Labor Day (first Monday in September)
Canadian Thanksgiving Day (first Monday in October)
Christmas Day (December 25)
Boxing Day (December 26)

In addition, LISA closes at 1 p.m. PT on Christmas Eve, and on New Year's Eve.

If a holiday falls on a Saturday, the holiday is observed the preceding Friday; if a holiday falls on a Sunday, the holiday is observed the following Monday.

Inclement Weather

LISA's headquarters is located on the majestic Pacific Northwest coast in beautiful Vancouver, British Columbia.

This is a very mild climate which only occasionally receives snow. In the rare event of very inclement weather we may experience reduced staffing levels and/or closure, depending on the anticipated weather conditions. We will indicate in the Latest News section on our Web site and our phone system if these periods of inclement weather affect service. Our service levels do not apply during these periods.

Self-Help Resources

Numerous self-help resources are available to help you quickly and easily resolve issues you may encounter when using LISA software.

Electronic Documentation

If you need a more in-depth explanation of a process, check the electronic LISA documentation which is automatically installed on your computer with the software at installation time. The guides open in Adobe Acrobat Reader.

To search for a word or phrase, click the binoculars or press CTRL+F; Acrobat searches the entire guide for you. The user guides are updated each time you upgrade to a new release.

You can also download the most recent guides from our Web site through a password-protected login.

Web Site

Our Web site contains several self-help resources including important notices. The can be accessed by clicking on SUPPORT from the main menu. Because these resources are important maintenance benefits, some options are login-restricted. When you visit a login-restricted page and enter your user name and password, your login information is stored on your computer until you click Log Out.

Software Downloads

We are committed to an ongoing program of product development, based primarily on input from you. We typically release cumulative patches to resolve issues that arise after a version's initial release.

We recommend you install the current release and cumulative patch for your software, or upon request, we can do this for you. We do not make changes to previous versions of our software. If you experience an issue, contact the Support Desk to determine if the issue has been resolved in the most recent release. You can download the latest software version and cumulative patch from our Web site. Select Downloads from the Support menu and then look for your product.

Customer Support Procedures

When you contact our Support Desk for assistance, we document the issue for future reference. We track each unique service request separately. We also try to log every contact (notes, emails, phone calls, faxes) about the service request. The vast majority of requests are resolved upon initial contact.

Our customer support analysts have considerable experience. The analyst who begins assisting you when you contact Support will typically work with you until your issue is resolved. Analysts may escalate or transfer open support requests to another analyst for a variety of reasons, including severity, time, and level of expertise required to resolve the request.

The Support Manager oversees how support resources are being used based on the status of support requests being made and outstanding.

Phone System

Our Support Desk lines can only be accessed through the main LISA switchboard. We endeavor to have a person, rather than an automated voice-mail system, respond to each and every call so as to provide personalized service.

New Issues

If you need to contact Support, please direct any new issues to the general Customer Support team instead of contacting an analyst directly you have worked with on a previous problem or issue. If you contact a specific analyst directly about a new issue, you may experience delays.

How You Can Help Us

When you contact Support, please be prepared. We will ask a variety of questions to determine what your issue may be and how best to solve it. You should know the following information:

- Exact wording of an error message
- Exact steps leading to the problem
- Type and version of network software (e.g., Windows 2000)
- Type and version of operating system (e.g., Windows Server 2003)
- Version of LISA software

You are our greatest asset when troubleshooting problems. Please be at the computer where the problem is occurring when you contact us and describe your issue in as much detail as possible.

The following tools can be useful when we are working to resolve your issue. Although we do not require you to have these tools, your use of them can often expedite resolution to your service request.

- Internet access
- Internet email capable of accepting and reading attachments
- File compression software, such as WinZip
- Adobe Acrobat Reader

Service Request Management

When an analyst begins assisting you with a new issue, he will be responsible for that issue until it is closed or escalated. If an issue remains open after the initial contact, your analyst will outline an action plan including next steps:

- What is the client to do before the next contact is made
- What is the analyst to do before the next contact is made
- When will the next contact be made and by whom

Service Request Severity

Although we strive to assist you with all service requests in a timely manner, we use severity levels to separate mission-critical issues from questions, allowing us to respond appropriately to each issue. There are four levels of priority starting at Low (3) and going through to Immediate (0). When you raise a service request, we will communicate to you the severity level which has been assigned to your issue.

Severity Request Classifications

Low Priority (3)

Low priority requests relate to issues that do not hamper the use of the software, but may result in a perception of poor quality by the user. In some situations, the request is simply informational.

Criteria:

- No functionality is hampered
- No workaround is necessary
- Cosmetic or appearance-related
- May not be overly obvious to the user
- Could lead to the perception of low product quality

Examples:

- Text boxes are slightly misaligned
- Colors are not consistent
- Titles are not consistent
- Spelling mistakes
- Mislabeled items
- Wrong order for command buttons between similar forms
- Noticeable inconsistency in the user interface

Medium Priority (2)

Medium Priority requests relate to issues that affect the normal functionality of the system.

Criteria:

- Functionality is only slightly hampered
- Workarounds are obvious and simple
- Does not slow the workflow of the system significantly
- Does not affect data integrity in any way
- The application does not crash

Examples:

- Menu item does not work but toolbar item does
- Text hints missing from toolbar items
- You must press the refresh button before a form will redraw after an update

High Priority (1)

High priority requests relate to issues that affect normal functionality and will prevent normal use of the system.

Criteria:

- Functionality is hampered
- Workarounds are not obvious or simple
- Slows the workflow of the system significantly
- Data integrity may be compromised
- System does not crash

Examples:

- Functionality will only work when done in specific steps
- Save or update functionality does not work
- Screen generates an error and then closes, but does not end application
- Update does not work, does not compromise data integrity, user is left with the impression the update was complete

Immediate Priority (0)

Immediate priority requests relate to issues that are the most detrimental.

Criteria:

- Functionality does not work
- There is no workaround
- Prevents the user from completing a task
- Data integrity is compromised
- System crashes

Examples:

- Command button does not work
- Update or insert is incomplete or corrupts data
- Screen generates an error and then closes the entire application
- Any data corruption

Troubleshooting

Analysts use the following procedures when troubleshooting issues you report:

- Check resources, such as internal development documentation and user guides
- Test the issue using sample data
- Consult with development staff
- Contact the Support Manager, who serves the escalation point for software design questions and program-related issues

Service Request Closure

We will close your case when you confirm your issue is resolved or if you cannot address the issue further. Closure means no further action is required from the analyst. If an issue either was not completely resolved or recurs, we will reopen the service request upon your request and continue assisting you with it.

A Special Note about Backups

Power outages, hardware and network failures, and other unexpected circumstances can lead to an unrecoverable data loss. Programs can be reinstalled but your data files are irreplaceable. We strongly recommend you ensure your data's safety by making backups regularly, testing the backups, and storing the backups in off-site locations safe from fire, flood, and theft.

If data loss or corruption occurs and a valid backup is not available, we may be able to repair and/or recover data. However, because this repair is not covered under your maintenance agreement, there is an additional charge for this service. If we attempt to repair data, we cannot guarantee estimated repair time or possible success in recovering data. Your best insurance against any form of data corruption or loss is regular, validated backups.

Service Level Goals

Our service level goals indicate the maximum level of service for which we strive and represent average performance throughout a day. Results during peak time periods may differ.

Our goal is to answer 90% of calls within 2 hours (during the business day). The maximum hold time is 10 minutes, at which point your call is transferred to an operator who takes a message or places you back in the hold queue. Service requests which require special attention are escalated through to our Manager responsible for Quality Assurance.

New Releases and Product Update Bulletins

LISA software is developed using Microsoft Visual Basic and Microsoft SQL Server technology. Our technology is robust enough for large multi-site installations and cost-effective for smaller single site implementations. Our software runs on standard Windows servers and workstations and integrates with Microsoft Office to provide you with even more flexibility with your information.

LISA combines the advantages of custom and packaged software. LISA software comes equipped with many valuable standardized features and provides regular upgrades, so that your system is always up-to-date.

Information technology is constantly evolving. Please contact our Support Desk and ask for the *Supported Technical Environment* for the LISA product you are using.

Software Patches and Update Bulletins

We continuously strive to provide high quality software solutions. From time-to-time software defects may arise. LISA will correct in a timely manner defects that may be detrimental to the functioning of your LISA software.

Generally, we aim to accumulate several patches and provide these through one combined update bulletin. We will notify you in the event a critical update needs to be applied. Updates are distributed through the Support section of our website.

Update bulletins may comprise not only patches, but also technical changes due to changes in associated operating system software and middleware.

Update bulletins are distributed through the Support section of our website.

Product Enhancements

LISA uses customer feedback to prioritize how we improve and enhance our software. An enhancement represents new functionality.

Product enhancements are provided through update bulletins or new product releases depending on the level of complexity, scope and other factors.

New Releases

Every few years, there is sufficient change in business practices and information technology such that a major new release is the most practical way to remain current. We advise our customer's well before-hand of a new release in order to prepare and allocate sufficient time to plan for its implementation.

Update bulletins, product enhancements and major new releases are the most visible ways by which LISA Technologies protects the software investment of our customers. While not as visible as our Support Desk, our development staff is working constantly "behind the scenes" on ensuring your LISA systems stay current with technology and prevailing business processes in the building products industry.

Value-Added Services

LISA offers a portfolio of services available throughout the lifecycle of your software. LISA provides consulting and education services which optimize the functionality of your software and enables you to respond quickly to changing business needs.

Consulting

LISA has technical and functional staff that can help ensure that you get the maximum benefit from your LISA software. Our services include:

Implementation Expertise: We make on-site implementation services available to our customers to ensure smooth transitions and successful projects.

Remote Technical Assistance: We provide a variety of technical services which we can be performed remotely, such as software installations.

Data Conversion: Migrating data from existing applications reduces the start up effort and maintains valuable customer, product and accounting data.

Report Writing: Being able to get the information you need, in the manner and form you need is why many LISA customers rely on our consultant's to address their ongoing reporting requirements.

Education

Our experienced training staff can ensure that you are up and running as quickly as possible, even for those with limited software experience.

LISA can provide training sessions onsite or remotely using web technology.

Classes are organized based on the demand of our customers. If you are in need of training, contact our Support Desk who will attend to arrangements.

Proactive Services

Providing the services and resources necessary for our customers to support and maintain their investment in LISA software requires ongoing communication. In addition to listening and learning from our customers, we also aim to be good communicators ourselves, including assuming a proactive role with our clients systems.

How We Communicate With You

We are committed to providing you with important information in a timely manner. To ensure your organization receives this information, please notify us of staff changes and help us keep our records up to date. You can contact our Support Desk who can update your customer profile in our system.

Newsletter

Our newsletter is your primary means of obtaining important product information, such as new releases, patch files, and tips for using your software effectively. We encourage all software users to subscribe. We also provide news about recent and upcoming releases, tips for using your software efficiently, and information about your self-help resources.

Go to our website, and then enter your email address on the left-hand side of the Home Page below the Sign up for Newsletters box.

Our newsletter arrives by email on a quarterly basis, and you can unsubscribe from the list at any time. Simply follow the link and instructions at the bottom of each newsletter.

Web Site

Our website can be found at either www.lisatech.com or www.lisalumber.com. We post release announcements and software issue updates on our Web site. Select Latest News from the Support menu.

Customer Feedback Initiative

We aim to listen, learn and improve. Customer feedback helps LISA align its priorities and resources to best serve the needs of our customers.

On an annual basis we email surveys to solicit feedback formally. Please fill them out and give us your candid feedback. This helps us ensure the continued success of our products and services. We read every returned survey and follow up as needed.

We email an annual satisfaction survey to the primary contact at your organization and ask that you rate how LISA is doing overall. We also share the outcomes of this process with our customers to complete the feedback loop.

Remote Check-up and Review

Sharing our knowledge and expertise of LISA software can work to your organization's benefit. One of the ways by which we can proactively help your organization to improve its use of LISA software, spot potential technical issues and perform fine-tuning is through a Check-up and Review.

This can be performed remotely, typically annually and takes a few hours time. Given many of our customers use our systems with minimal staff, a proactive approach provides the opportunity to spot potential problems before they happen. Our technical experts can pinpoint areas for performance improvement, and our functional staff can address any process-related issues.

Normally a remote review takes a few hours time. Our LISA experts will talk to both your technical and functional staff. We will look at any issues or concerns you may have. We will also look for ways to streamline and improve how you are using LISA. We will provide a list of recommendations and an Action Plan.

LISA Terminology

Beta Program

Selected clients use a version of the software (before release) live for eight to ten weeks, providing feedback by completing specific tasks and surveys.

Cumulative Patch

A self-extracting executable file that resolves specific issues identified in the current version of LISA software. Issues resolved in the cumulative patch are listed in the patch readme file. To review the patch readme and download the latest cumulative patch, select Downloads from the Support menu on our Web site.

LISACare Program

LISACare represents the bundles of products, services and resources available to LISA customers covered as part of a Support and Maintenance program. The program offers two plans: LISACare and LISACare Plus.

Software Defect

Defects arise when a product does not perform as described in our documentation or leaves the perception with a customer that there is a quality issue.

Software Enhancement

New business or technical functionality that has been added to LISA software, such as a new feature or features, or technical improvement.

Service Request

A request for some type of service to be performed by our Support Desk staff. This may simply be a functional question to investigating a potential software defect.

Supported Technical Environment

LISA software is developed and tested to work in a specific technical environment. This includes specific versions of desktop and server operation systems software, database software and networking. Using LISA software outside the parameters of the supported technical environment may lead to problems, and is not recommended. We cannot guarantee support of LISA products being used in a non-supported technical environment.



Customizable enterprise software and tools for the building products industry.

LISA Technologies Inc.
13091 Vanier Place
Suite 200
Richmond, B.C. Canada V6V 2J1

(604) 207-1363 www.lisatech.com