

# Plus Framework



## Partner Plus Framework Addendum

### Configuration and Support Scope Document

#### Version 4.28

This document lists and defines support and maintenance services that are included at no additional cost for the Partner Plus Framework once installation is complete, a customer enters “maintenance mode” and ongoing licensing fees are paid to Partner Software. Maintenance mode begins once installation is complete. Any features or services not listed as included in this scope of work are not part of the standard Partner Plus Framework product and are not covered by the installation, configuration, and license fees for the Partner Plus Framework. Such additional items will generally incur an additional cost and may require a separate service order.

The Partner Plus Platform requires the purchase of the Partner Basic Platform. The Basic scope documents have been incorporated into the master Scope document, which covers configuration and support of both the Partner Basic and the Partner Plus platforms. Hereinafter, references to “Plus Platform” will be understood to include both the Partner Basic and the Partner Plus platforms.

#### Configuration Included with Partner Software Staff Installation

The following list includes software and configuration services considered to be a part of the Partner Plus (including Basic) Framework at the time of the Partner Software staff installation.

- **User Documentation**—Available standard end-user manuals and materials are provided in the software’s help menu.
- **Partner Hub**—Server software that manages centralized applications, data, and interfaces essential to the Partner System.
- **Update**—Automated update infrastructure for software, data, and configuration of the Partner System.
- **Map Viewer**—End-user software platform for map-based applications.
- **Map Publisher**—Map data publisher for the Partner System. Imports a variety of CAD, GIS, and other data and converts it to Partner’s ROVER format, optimized for efficient update and display, and is compatible with a variety of operating systems and devices. Allows configuration of symbology, data fields, scaling, and other behaviors within reason. The following Map Publisher components are installed without customization but may be customized during the Map Publisher training workshop following installation:
  - **Field Display in Data Panel**—Generic configuration of fields and available data from the GIS and other approved sources configured to display in the Data Panel.
  - **Find Items**—Generic configuration of *find items*, or indexed searches of map data grouped into categories (e.g., “Poles, Consumer Names, etc.) are included in installation.
  - **Labels**—Generic configuration of map data for display of text in the Map Viewer based on available data in the GIS database at time of installation.
- **Map-Space Legend**—one default *map-space legend* is included at installation. A map space legend controls zoom button scales, center point, and background color and should not be confused with a map-set legend.
- **Mapsets**—Two *mapsets*, Electrical and Tiger, are included by default—if available at installation. A “mapset” is a container for map data (both graphical and informational) and actions (tools for working with the data). The *Electrical* mapset is generated from a GIS export of the electrical mapping model. The *Tiger* mapset consists of publicly available landbase mapping data from the U.S. Census Bureau.
- **Merging External Data Sources**—up to eight external data sources, such as consumer data or WindMil® external tables, may be included.
- **Standard Symbology**—Generic display of map symbology.
- **Transforms**—Up to three data manipulation transforms may be added if deemed necessary to import external data sources.
- **GPS Integration**—Basic integration with GPS through standard NMEA or a limited integration through the Trimble® Standard Interface Protocol (TSIP).
- **Drawing**—A sketching tool for temporary redlining and markup in the Partner Map Viewer. Supports a variety of printing, plotting, and export options.
- **Standard Overview**—A “birds-eye” grid overview of records contained in the applications available in Partner Plus. Records are separated per application and display number of records and priority (if applicable).
- **Filter Table**—A tool that allows the user to query data from every field available in their Partner Plus applications. The Filter Table includes query templates that can be saved company-wide and on an individual user basis. Also included are standard, one-touch CSV, HTML, Chart, Map Book, and Google Map exports.
- **Local Synchronization**—A method for transferring, sharing, and updating records between individual client installs and an on-site Hub database. A local network connection is required for connectivity.
- **Standard Symbology**—Icons and styles designed by Partner Software that are generic to the Partner Plus framework.

## Support Included\*

The following list includes software, features and services considered to be a part of installation and supported at no charge once a customer has entered into maintenance mode and begun paying annual licensing fees.

- **Map Viewer**—Reliable performance of the Map Viewer for panning, zooming, and other basic operation is supported.
- **Drawing**—Default actions and symbols and a standard set of printing, plotting and export options.
- **GPS Integration**—Two protocols are supported: the NMEA GPS protocol or a limited Trimble® Standard Interface Protocol (TSIP).
- **GPS Post Processing Integration**—Post processing through Trimble® Pathfinder Office when used in conjunction with supported devices running Tri-Global MobileStaker™.
- **Partner Hub**—Providing the ability to install and update all Map Viewers inside a customer's local area network.
- **Map Publisher**—Map Publisher is supported in maintenance mode with the following components:
- **Field Display in the Data Panel**—Fields and available data from the GIS and other sources configured during the installation phase are properly displayed in the Data Panel. Fields are expected to be visible on subsequent publishes provided the data architecture of the source mapping database or GIS have not changed. See *Configuration for Modified Data Sources* in the "Support and Configuration Excluded" section.
- **Find Items**—Configured find items function correctly.
- **Labels**—Labels correctly display text in the Map Viewer based on text values configured from available data in the GIS database at time of installation.
- **Map-Space Legend**—Map-space legend configured at time of installation functions correctly.
- **Mapsets**—Two mapsets, Electrical and Land base, function correctly.
- **Merging External Data Sources**—External and preconfigured merges function properly, provided the source data architecture of the external data has not changed.
- **Standard Symbolology**—Icons and styles designed by Partner Software that are standard to the Partner Plus Framework.
- **Transforms**—Three scripted data manipulation transforms function correctly.

\*There may be additional support fees if the installation of Partner Plus Framework was not a Partner Software staff installation.

## Support & Configuration Excluded

The following list includes software, features and services not covered and supported during configuration or once a customer has entered into maintenance mode. This list is an overview and cannot account for every possible support or configuration issue. In general, anything out of the scope of the support inclusions listed in this document may incur a service order and/or additional fees.

- **Aerial Photography**—See the *Partner Aerial Photography* scope document for details about configuration and support options for this application.
- **Partner Web**—See the *Partner Field Design Application* scope document for details about configuration and support options for this application.
- **Additional Published Mapsets**—Any more than two mapsets are excluded in the configuration of the Partner Plus Framework. More than ten published map layers will not be supported in the Partner Plus Framework.
- **Additional Legends**—More than one map space legend, such as a legend with a different background color, are excluded in the configuration of Partner Plus.
- **Data Preparation**—Provision of source data and data relationships are the responsibility of the customer. If Partner staff must discover data relationships during configuration or once a customer enters maintenance mode, this may incur additional fees.
- **Configuration for Modified Data Sources**—Any configuration changes needed for the Map Publisher as a result of changed data architecture are the responsibility of the customer.
- **Alternate Map Publisher Installations**—Additional Map Publisher installations, such as for contractors or consultants.
- **User Training for Partner Plus Framework**—Training for the Map Viewer, Drawing, GPS function or any other component of Partner Plus is not included. Live training, either on-site or at Partner's facilities, is available at additional cost.
- **Relocating Records to Map Items**—Data collected with Plus products are only as accurate as the underlying map data. It is the responsibility of the client to provide geographically accurate map data for use with all Plus products. It is not within the purview of support to correct inaccurately collected data.
- **Travel Costs**—Travel costs associated with training or any on-site visit to a customer.
- **Additional Transforms**—More than three scripted data manipulation transforms.
- **Customer-Modified Transforms**—Support needed to repair script or transform damage resulting from customer modification to the script or transform.
- **Key Fields**—Partner is not responsible for discovery of key fields for external merges. The customer must provide key field names at time of installation or Partner may charge hourly for data relationship discovery.
- **Custom Data Panel Display**—Cosmetic and functional changes to the Data Panel are not standard and will incur an additional fee.
- **Database Administration**—Any issues arising from database administration performed by any program external to Partner Software, whether performed with a third-party application or a direct database connection, are not supported.
- **Custom Server Support**—Partner Plus products use the Partner Hub Architecture for data storage and retrieval. Support of additional client specified servers or databases is out of scope.
- **Data Backup and Recovery**—It is the client's responsibility to maintain backups of their local server data and configuration in case of critical hardware and software failure. Partner does not maintain backup or recovery systems for data stored locally in the client's network.
- **Hardware Support**—Partner Software does not support any hardware or hardware specific issues. Any software issues arising from hardware that does not meet the minimum requirements to run Partner applications will not be supported.
- **Network and IT Support**—Support and maintenance of Network and IT infrastructure is the responsibility of the customer. Any issues

arising from the performance or failure of this infrastructure—i.e., 1) failure to properly install, maintain or update Java on all Partner end-user machines, 2) failure to allow for all Partner Software programs to update and function behind firewall or virus checking software, or 3) failure to allow Partner Software programs to function within the framework of third-party IT administration—are the responsibility of the customer.

- **Operating System Support**—Any issues arising from the customer's operating system, such as restrictive security settings that prevent the Partner Map Viewer from updating, for example, are the responsibility of the customer and the OS vendor. Partner Software will make a best effort to work within the security constraints at a customer site. However, extensive troubleshooting may incur additional fees, and ultimate responsibility lies with the customer.
- **Custom Symbology**—Any requested icons or styles that are not generic to the Partner Basic, Plus or Complete Framework are not included at time of installation or in maintenance mode.
- **Third-Party Support**—Any issues arising from installation performed by a third party will be supported by that third party.
- **Third Party or Customer-Developed Partner Plus Applications**—Although Partner Software is a system that provides the technical capability for the development of custom built applications, either internally by the client or externally by a third party, Partner is not responsible for the support or configuration of those applications. Contact Partner for pricing if your company needs development or support for a custom application.
- **Nonstandard GPS Integration**—GPS data collected from external sources can only be imported into Partner Plus through a specifically formatted CSV file.
- **Custom Graphic User Interface (GUI) Manipulation**—Specialized user interfaces and/or custom layouts and configurations.
- **Custom Actions**—Additional custom actions enacted from the menu bar or wheel menu.
- **Custom Reports**—Report designs and layouts that deviate from our standard HTML report print/design.
- **Custom Scripting**—Any additional scripting outside of the standard scripts included in the Partner Plus Framework.
- **Other Remote Connection Support Software**—Remote connection software, other than Partner's preferred remote support application, may be used if required by the customer; however, Partner Software may, at its option, bill hourly for its time spent setting up and/or troubleshooting a custom remote connection. See the *Remote Customer Support Requirements* section below for details.
- **Remote Synchronization**—Any issues arising from attempting to synchronize data over a remote connection are not supported in the Partner Plus framework. For supported remote synchronization options, review the "Partner Complete" framework option.

## Additional Specifications

### Requirements Specific to Current Release/Version

This release of the software has specific requirements and changes that may affect applications running on the Partner Platform.

### Remote Customer Support Requirements

Remote access is an essential aspect of Partner support. With the installation of the Partner Plus Platform, Partner will provide, at no additional charge, a remote support application that Partner will maintain as long as the customer is in maintenance mode. This remote support application is a safe and reliable means of accessing client sites with a variety of security options. Allowing Partner to use this application will result in the highest level of service and responsiveness Partner can provide.

Partner may provide support through a remote connection over a client-provided VPN, although such a case may result in additional support fees. Partner requests a *Generic Partner Access Point*, or a single user login VPN account and password. Partner will notify the client prior to accessing the VPN account. The Client is responsible for making sure VPN credentials are valid prior to contacting Partner for support. Any changes to login information must be provided to Partner as soon as they are implemented.

### Required Third-Party Software

In addition to the requirements for remote support above, the use of Partner products requires other software applications to be installed. Following is a list of required applications of which the client is responsible for installing at each seat of Partner:

- **Microsoft® Windows®**—The Windows operating system is required. It is **strongly** recommended that all machines have virus checkers and that a firewall is enabled on the machine.
- **Java Runtime Environment (v1.7 or higher)**—Although Partner applications bundle Java for regular use, Partner does use the operating system JRE for its map and software updating mechanism (<http://www.java.com>).
- **A web browser**—Necessary to access reports, staking sheets, etc., and necessary to access the Partner Web. The standard privacy settings for Internet Explorer may interfere with Partner Web functionality and may need adjustment.
- **A PDF viewer**—Necessary to view reports and staking sheets.
- **A printer driver**—Necessary to print map plots and staking sheets.
- **A text editor**—Text editing is essential, as the built-in alternatives do not work well in a remote support environment.
- **A file compression program**—Built-in zipping or file compression applications are also not adequate for Partner use.
- **An SFTP (Secure FTP) client**—Partner needs to be able to move files between Partner and the customer site. SFTP access to <sftp://storage.partnersoft.com> or Partner Software's blind drop site may be required. Windows® Explorer access, if enabled by the LAN network security, should be adequate.

Additionally, the Partner platform requires certain third party software, which are included at no additional cost in a Partner install. Any such third-party solutions are provided AS IS. You agree to be bound by the terms and conditions of the licenses that are included with such third-party solutions. You may not redistribute third-party solutions unless permitted in the license, and such software providers are third-party beneficiaries of the relationship between Partner and licensee.

### Third-Party Software Examples

For Partner to effectively support the Plus platform, the licensee must install certain types of third party programs, many of which users will

already own or will be available free of charge as open source software. Users are responsible for their own security and malware detection and prevention, and Partner makes no warranty that any of the example products used by some Partner customers are safe or effective for any other customers. Partner is not endorsing these products but provides them as examples and for informational purposes only. The following types of programs are required, with an example given of each:

- **Web browser**—Users must install a web browser. One example used by some Partner customers is **Mozilla® Firefox®**, for web browsing (<http://www.mozilla.org/>).
- **PDF viewer**—Users must be able to view pdfs. One reader used by some Partner customers is **Foxit Reader**, for PDF document viewing (<http://www.foxitsoftware.com/>).
- **Notepad**—Customers must install a text editing program, as those bundled with Microsoft® Windows® are inadequate. One such program used by Partner customers is **Notepad++** (<http://notepad-plus-plus.org/>). Other customers use text editors including **TextPad** or **Ultraedit**, which require a paid license (<http://www.textpad.com>, <http://www.ultraedit.com/>).
- **File compression programs**—Users must be able to compress and decompress large files. One such program used by some Partner customers is **7-Zip** (<http://www.7-zip.org>).
- **Machine Process Viewer**—Users must provide Partner with a method of reviewing machine processes. One such program used by some Partner customers is **Process Explorer**—This Microsoft-provided program offers a superior view of machine processes over that of the built-in Task Manager. (<http://technet.microsoft.com/>)
- **Secure File Transfer Protocol program**—Users must provide Partner with a method of transferring large files. If this is not available through **Windows® Explorer**, some customers use **FileZilla®** (<https://filezilla-project.org/>).

### **Maintenance and Support**

After the initial installation invoice for Partner Plus, the customer will receive an invoice for annual license fees. At this point, Partner Plus is considered to be in use and the customer will transition from the installation stage to maintenance mode.

There are separate scope documents for additional software or features associated with Partner applications such as the Partner Field Design Application, Partner Staking-to-GIS Interface, Partner Distribution Inspection, and Partner Right of Way Vegetation Management.

**Partner's Required Remote Support Application: eBLVD . The required Remote Support Application may be changed at Partner's sole discretion and at no cost to the customer.**

**Backing up files and records are the responsibility of the customer.**