



# MyID Customer Handbook

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2	June 2020	NRC	1.2 3.10	Support hours amended. Customer Portal access added.  Clarification on the use of inclusive professional Services
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## 1 Introduction

This handbook provides information to customers of the MyID product, primarily focusing on Support & Maintenance, licensing and upgrading.

The information applies to all variants of the MyID product unless stated otherwise.

## 2 Support & Maintenance Service Overview

This section details the level of service that Customers can expect from Intercede as part of the Support & Maintenance agreement for their MyID system. It applies to customers who liaise directly with Intercede for Support & Maintenance.

Specific options and any exceptions will be defined in the Certificate of Support (Refer to Appendix A for a sample certificate). Requests from the customer for pre-sales support, general assistance and consultancy are outside of the scope of this document.

Intercede's Customer Support encompasses the provisioning of MyID Technical Support and Product Maintenance, e.g. Upgrades & Updates.

Intercede offer two tiers of Support. Refer to section 2.2 for more details.

Intercede provides support using the English language.

### 2.1 Definition of general Terms

Term	Meaning
Business Days	Monday to Friday excluding US public holidays.
Customer	The organization (or a representative of the organization) that is entitled to receive assistance from the Intercede Customer Support team.
Incident	An unplanned interruption to the service offered by the MyID system or failure of the MyID application.
Problem	The cause of one or more incidents.
Production System	A MyID deployment that is being used by the Customer for the purposes of managing credentials targeting active users etc. i.e. not for the purposes of application testing or evaluation.
Response Time	The elapsed time from when a request to raise a Support Ticket is first received by Intercede via one of the agreed lines of communications until when Intercede send out an acknowledgement and a statement of next steps that are to be performed.
(Support) Ticket	A record of a specific issue raised by the Customer to Intercede's Support team. A unique reference number will be assigned to the ticket, which must be included in all communications relating to the issue.

## 2.2 Support & Maintenance Services

The following table summarizes the services available to customers with an active Support & Maintenance contract:

Service	Standard	Ultimate
Hotfixes, updates, upgrades	✓	✓
Porting of Customizations & associated Professional Services (for compatibility with product upgrades) <sup>1</sup>	Chargeable	Chargeable
Technical Support Level	Level – 3	Level – 3
Support Hours*	9am–5pm Mon-Fri EST	
On-Call Engineer (Severity 1 issues with the production environment only)	✗	24 x 7
Access to the Support Team	Email, phone	Email, phone
(US) Toll-free Phone Access	✗	✓
Access to Intercede Customer Portal	✓	✓
Annual System Health Check	✗	✓
Technical Consultancy	Chargeable	Chargeable for excess hours <sup>2</sup>
Executive Service Review	Annually	Quarterly
Device licenses for Test environments <sup>3</sup>	Limited	Same as Production

\*Excludes US Public holidays

## 3 Maintenance

Maintenance is the supply of upgrades, updates and other software changes to Intercede’s portfolio of software products. The decision to release an upgrade or update and its content is at Intercede’s sole discretion.

Maintenance is not provided for certain development tools, SDKs and other licensed software. The Certificate of Support & Maintenance Agreement will indicate any limitations of maintenance.

Intercede strongly recommend utilizing their Professional Services team to assist with the deployment of Product Upgrades & Updates. Please note that the porting of customizations and any assistance with upgrading the system is usually a chargeable activity, and not covered under the S&M contract.

### 3.1 Definition of Upgrades

A product upgrade is a significant release of a product that usually provides additional features and improvements to existing core functionality. It will not include customer-specific customizations. Typically, an upgrade will be indicated by a change in either the major or the minor version number, e.g. V10.8 – V11.3.

### 3.2 Definition of Updates

A product update is usually a Service Pack. It tends to contain bug fixes and feature improvements. It may contain addition new features such as support for a new device. Typically, an update will be indicated by an update number associated with a specific product version, e.g. V11.3.1.

<sup>1</sup> Relates to customisations to the MyID product undertaken by Intercede

<sup>2</sup> Refer to Certificate of Support for details

<sup>3</sup> Refer to section 10.2 for more details

### 3.3 Definition of Hot Fix and Patch

For the resolution of a defect, typically in a response to a Support Request, Intercede may provide a Hot Fix or a software patch. The decision as to what to supply will be at Intercede's sole discretion although the Customer will be consulted.

A Hot Fix will typically contain a solution to one issue only. It may require manual steps to be undertaken in order to deploy the changes rather than using a software installer program. This approach is intended to enable Intercede to produce the fix as quickly as possible and to minimize the risks of adverse impact of applying the change and consequently the degree of testing that the Customer should need to undertake prior to deployment in their production environment.

Note. Critical Security Updates may also be delivered in the form of a Hot Fix.

A patch is likely to contain fixes for multiple issues. It may also contain minor enhancements. A patch will not necessarily have been produced specifically for the Customer and therefore some of the changes within the patch may not necessarily be of relevance or importance to the Customer. Generally, a patch (rather than a Hot Fix) is supplied in response to a support request for one of the following reasons:

1. A patch for the product already exists that addresses the customer's issue.
2. Fixing the specific issue raised by the Customer will require changes to multiple modules
3. Fixing the issue will have an impact on other functional areas and therefore changes to those areas will also be necessary
4. The Customer requires fixes to a number of issues and for convenience and efficiency for them and Intercede, it has been decided to roll up multiple changes into one delivery.

### 3.4 Third Party Products

MyID maintenance of third-party products is generally excluded from the Support & Maintenance agreement provided by Intercede.

Before any updates and upgrades to such products are applied, the Customer must seek advice from Intercede's Support team on the compatibility of the update / upgrade with their MyID solution. Intercede are not obliged to undertake verification testing under the terms of the Support & Maintenance agreement. Examples of such third-party products include, but are not limited to, smart cards, device drivers, card middleware, HSM & CA client software, specialist image capture products, printer firmware.

Compatibility with such products may be limited to the latest MyID product and therefore an upgrade may be necessary.

#### 3.4.1 Obsolete Third-Party Products

If a manufacturer has issued an end of life / end of support notice on a third-party product that was previously compatible with MyID, Intercede will, in future product releases, either deprecate compatibility or maintain it on a *reasonable endeavors-only* basis. Examples include smart card middleware, card printers and HSM's.

### 3.5 System Health Check

Depending upon the level of Support & Maintenance agreement that has been purchased, Intercede may undertake a periodic Health Check of the Customer's MyID production environment. This would involve an Intercede technical consultant performing a number of checks to identify issues such as misconfiguration, performance problems, missing patches, etc. It is also an opportunity for the (End) Customer to discuss any ongoing issues or future plans. A report will be prepared summarizing our findings and remedial actions arising.

The Health Check may be undertaken on the Customer's site or via remote access as mutually agreed. Typically, Health Checks will be scheduled upon renewal of a Support contract.

## 4 Technical Support

### 4.1 Technical Support Levels

Intercede provide Level-3 Technical Support to its customers. Level-1 is expected to be undertaken by the Customer. Level-2 is expected to be undertaken by the Customer or their service provider.

#### 4.1.1 Level-1:

The first point of contact for a user of the MyID application requiring assistance. Incidents that should be resolved by the Level-1 Support team typically relate to usage or questions that can be answered by referring to product documentation and or using inbuilt functionality. Typically, Level-1 technical support is undertaken by the Customer's help desk. Intercede's expectation is that the Level-1 support team are conversant with the use of the MyID product within their organization and are competent in using the additional functions available to them.

#### 4.1.2 Level-2:

Where an issue cannot be resolved through level-1 technical support, it is to be handled by the level-2 technical support team. This typically would be suitability skilled system or application administrators within the Customer's organization, or their service provider. They would use more advanced troubleshooting techniques such as examining log files, eliminating other subsystems, misconfiguration and incorrect usage as the possible cause, attempting to reproduce the issue within a representative environment etc. Level-2 support also encompasses the identification and resolution of problems through reconfiguration of the product in line with product documentation.

#### 4.1.3 Level-3:

Intercede's Level-3 technical support should only become involved after all efforts by level-1 & 2 Support teams to resolve the incident or problem have been exhausted, or where a deficiency or limitation of the product exists.

### 4.2 Service Level Agreement (SLA)

Severity Level	Description	Target Response Time	Status Update Frequency
1 – Critical	Production System is down, or service is severely impacted	Within 2 hours	As agreed with Customer, but no longer than daily
2 – High	Production System is useable, but an operationally important function is not available. For example, the system is unable to issue one particular type of device.	Within 4 hours	Daily (Business Days)
3 – Medium	Product is useable but with some moderate impact or restriction	Within 1 day	Every 3 business days
4 – Low	Minor problem, product deficiency or documentation issue	Within 5 days	To be determined based on the problem reported

#### Notes:

1. The Severity level of a Support Ticket may be suggested by the Customer but will be assigned by Intercede.
2. All times are within the appropriate service hours as specified in section 2.2.
3. The underlying problem may be resolved by various methods, for example, the supply of a hotfix, software update, configuration change etc.

4. A Support Ticket that does not relate to a Production System will be assigned a severity no higher than 3.

### 4.3 Technical Support Requests

Intercede's technical Support team handles the following request types:

1. **Product Defect.** A defect is defined as a problem within the product that prevents the product from performing in the way that the product documentation claims. The resolution of a defect generally requires an update to the software or possibly a script to modify the data within the database. Where the Customer requires resolution as soon as possible, this is likely to be delivered in the form of a Hot Fix or software patch. (Refer to section 3.3 for more details). In some cases, Intercede may decide to address the defect in a future product release rather than providing a solution against the Customer's current product revision.
2. **Product Deficiency.** A deficiency is defined as a problem within the product that prevents the product from performing in the way expected by the Customer, is not explicitly documented, but can be regarded as a fair and reasonable expectation of the product. Deficiencies will be assessed by the Support Manager and the Product Manager to determine if they should be treated in the same manner as either a Defect or an Enhancement Request.
3. **Enhancement Request.** Additional product features or capabilities. These will be assessed by the Product Manager for consideration for inclusion on the product roadmap. It may be that the enhancement is considered too customer-specific in which case, the request will be passed on to the Customer's Account Manager for further review. SLAs as defined in section 4.2 do not apply to Enhancement Requests.
4. **Request for Assistance.** Requests that do not fall into the other categories listed above. Examples would be assistance with installation, implementation, configuration and usage of the product. These requests will be assessed by the Support Manager to determine if it would be more appropriate for the request to be handled by another Intercede team, e.g. Professional Services or Sales Engineering. It should be noted that assistance from other teams may be subject to additional fees.

#### Notes.

1. Each request will be assigned a unique reference number by Intercede, which must be referred to for tracking and reporting purposes.
2. Intercede may create a new request(s) if an existing support request evolves, in order to maintain clarity and focus.
3. The Customer must provide all information as requested in a timely manner in order for the Support Team to provide an effective and efficient service.
4. If it is determined that an issue raised as a Support Request was not caused by any Intercede product, Intercede reserves the right to charge the Customer for any effort spent on the request.
5. All Support activities by Intercede staff will normally be undertaken at their offices. If on onsite visit is requested by the Customer or deemed necessary by Intercede or the Customer, Intercede reserve the right to make a charge for their time onsite and any associated expenses.
6. A Support request will remain open until instructed by the requestor, or after 2 weeks of Intercede providing a resolution or waiting on additional information, unless agreed otherwise.

7. For customers evaluating a product and wishing to report product questions or defects, the appropriate route is via your sales or sales engineering contact. Product Technical support is reserved to those customers who have an active Support & Maintenance contract in place.

#### 4.4 Support for Production Systems

See section 2.1 for the definition of a Production System.

Support requests relating to a Production System can only be accepted by the Intercede Support team if a formal handover of the Production Environment has been undertaken, resulting in acceptance by the Support team. This handover process is typically performed by the Customer or the Professional Services team responsible for the installation and typically takes the form of submission of applicable deployment documentation. This process is designed to ensure that the Intercede Support team are best placed, with the necessary background information to respond in an effective and efficient manner to higher severity incidents. Requests for Support of the Production System prior to the handover will normally be handled by the Intercede Professional Services team, for which additional charges may be incurred.

#### 4.5 Support for Non-Production Systems

Support for issues identified within development & test environments is usually provided through the Intercede Customer Support team, providing appropriate server licenses have been purchased and the necessary S&M fees have been paid.

Support in relation to installing the product in additional or replacement non-production environments is usually handled by Intercede's Professional Services teams as a chargeable engagement.

#### 4.6 Remote Access to Customer's Systems

In order to assist with the investigation of a problem it may be more efficient for Intercede to participate in a remote access session with the Customer's representatives. This is subject to the availability of the appropriate resources within Intercede and the nature of the issue. It is the responsibility of the Customer to make available the necessary facilities (for example, software) to enable Intercede to participate in such a session. This is to ensure that the appropriate corporate policies are adhered to. Intercede will act as an observer & advisor on the session. Intercede will not undertake any changes to the Customers' systems.

#### 4.7 Out of Hours Support

When included in the Support contract, Intercede will provide access to a support engineer outside of normal working hours. The hours of availability are as defined in section 2.2. Out of hours support is only available to assist with a Severity 1 incident affecting the Production environment.

The engineer will provide assistance as necessary.

#### 4.8 Third-Party Products

MyID Support in relation to integration with third-party products is limited to those products that Intercede has explicitly stated as being compatible with the release of MyID in use by the Customer. Examples of such third-party products are smart cards, device drivers, card middleware, HSM & CA client software, specialist image capture products, printer firmware.

The customer must seek advice from Intercede's Customer Support team before using any third-party product where it is not clear in product documentation that it is already compatible. This also applies to any updates & upgrades of third-party software. Intercede are not obliged to undertake compatibility testing or implement any product changes to obtain compatibility under the terms of the Support & Maintenance agreement.

Compatibility with such products may be restricted to the latest MyID product and therefore an upgrade may be necessary.

#### 4.8.1 Obsolete third-Party Products

If a manufacturer has issued an end of life / end of support notice on a third-party product that was previously compatible with MyID, Intercede will offer Support on a *reasonable endeavors-only* basis. Examples include smart card middleware, card printers and HSM's.

### 4.9 Support Relating to Non-Intercede Components

Intercede is only able to offer support in relation to components that it has supplied or the integration of its components with 3<sup>rd</sup> party products (as detailed in section 4.8). Intercede is unable to offer support in relation to the use of 3<sup>rd</sup> party products, e.g. use of a smart card, even if issued and managed by the MyID System.

### 4.10 Contacting Intercede Customer Support

Customer Support may be contacted either by email or telephone. New requests will be assigned a unique reference number and an acknowledgement email will be generated.

Telephone requests should be limited to reporting of Severity level 1 issues. Requests relating to lower severity issues will be prioritized and processed in line with the stated SLA.

The following information must be provided to Intercede when raising a new support request:

- Name and contact details of person raising the request
  - Must be a nominated contact in relation to the Customer
- Name of Customer
- Name of the Environment affected by the problem, e.g. Production, Test
- Customer's severity level and justification if Severity 1 or 2. See section 4.2.
- Current System Status Report from the environment experiencing the problem
- Detailed description of the problem
- Details of what investigation has already been undertaken by the Customer, along with any actions taken to resolve the problem
- Relevant extracts of logs, data etc. already gathered

#### 4.10.1 Contact Details

Email: [support@intercede.com](mailto:support@intercede.com)

Telephone: +44 1455 244 844

Note. Support requests may be redirected to an answering service outside of normal UK business hours. Intercede will only respond to requests for Support from the Customer's nominated contacts.

#### 4.10.2 Intercede Customer Portal

A Customer Portal is available providing access to information on Intercede's product range including documentation, knowledgebase articles and product notifications. Latest information relating to support hours and contact details is also available. If you require access, please email [portal@intercede.com](mailto:portal@intercede.com) to request an account to be set up.

### 4.11 Authorized Support Contacts

Intercede is very conscious of the sensitivity of the data held within, configuration, and usage of a MyID deployment. Therefore, to protect our customers, the Intercede Customer Support Team are only able to discuss deployment-specific issues with pre-authorized named individuals within the customer organization. An existing Authorized Support Contact may request additional colleagues to be added to the list by emailing [support@intercede.com](mailto:support@intercede.com) or your account manager.

## 4.12 MyID Training

Intercede strives to provide the best possible support to our customers. To assist us to help you as efficiently and effectively as possible, we strongly recommend that system administrators and others within the organization that are responsible for maintaining and supporting the MyID deployment undertake formal training provided by our Professional Services team. Contact your account manager for more information.

## 5 Professional Services

Consultancy and assistance are also available as a chargeable service through Intercede's Professional Services Team. A dedicated Technical Consultant and, if appropriate, a Project Manager is assigned to assist with activities such as:

- System Design
- Business Process / Use Case definition
- Developing customizations (custom-specific enhancements or new functionality).
- Porting of existing customizations and associated Professional Services (for compatibility with product upgrades).
- Assistance with installing, configuring and commissioning new environments.
- Assistance with installing and testing patches.
- Assistance with changes to system configuration.
- Assistance with performing upgrades.
- Training on the use and support of MyID

Contact your account manager for more information.

### 5.1 Inclusive Professional Services

Depending upon the support tier that has been purchased a number of hours of assistance by an Intercede Technical Consultant may be available to the Customer. Assistance must relate to the Customer's deployment and cannot be used for general consultancy. Typically, this effort should be used for assistance with system updates and minor reconfiguration. Note. Assistance outside of normal business hours will incur additional costs, details on request. Customer Support will inform the Customer if a specific request is to be undertaken by the Professional Services (PS) team and therefore will consume part of their allocation of time.

Professional Services time not consumed within the period of the Support contract may not be carried forward to the following year.

Specific requests by the Customer to consume assigned Professional Services time must be made via email to Customer Support for resource scheduling. Note. A minimum of four weeks' notice is generally required.

## 6 Escalation Procedure

A Support Ticket may be escalated by the Customer if deemed appropriate, or by Intercede themselves. Reasons for escalation include failure to meet the Target Response Time(s).

The Customer must escalate the issue in the first instance to the Customer Support Manager ([support.manager@intercede.com](mailto:support.manager@intercede.com)).

In the unlikely event that the matter still cannot be resolved to the Customer's satisfaction, the customer may escalate to the Chief Operations Officer ([coo@intercede.com](mailto:coo@intercede.com)).

## 7 Service Reviews

Intercede will undertake periodic Service Review meetings with the Customer to review how both parties are performing against the SLA in terms of open tickets, closed tickets, ageing of tickets, incidents, escalations, customer satisfaction, consumption of resources etc. The meeting may also identify any training needs, and the ongoing suitability of the current level of cover.

The number of reviews to be undertaken is determined by the level of cover that has been purchased. Usually, these meetings will be held via telephone although opportunities should be identified to hold the meetings face to face.

## 8 Product Lifecycle

MyID continues to be enhanced, with each product update offering new capabilities and feature improvements. Typically, product updates are released quarterly. Customers with an active Support & Maintenance contract are entitled to standard product updates. Any customizations may need to be re-implemented in order to be compatible with the latest product. The porting of customizations and any assistance with upgrading the system is usually a chargeable activity, and not covered under the S&M contract.

Notification of the availability of new product releases along with details of “What’s New” will be published on the Customer Portal. Registering for the Portal and subscribing to notifications ensures that you receive the latest product news as soon as it is published.

### 8.1 Support & Maintenance

Upon release of a new version of MyID, that product becomes generally available as the current release, it is sold as a Commercial Off The Shelf (COTS) solution and should be used for all new installations. Unless agreed otherwise, the MyID product will follow the lifecycle as defined below.

#### 8.1.1 Standard Support & Maintenance

For a period of 3 years from general availability, *Standard Support & Maintenance* will be available, whereby Intercede will provide the Customer with product upgrades (when available), updates and bug fixes. Intercede will also consider the implementation of customizations.

Note. An update or customization may require the Customer to undertake an upgrade.

#### 8.1.2 Limited Support & Maintenance

Once a product version is no longer under standard support, it moves to *limited support* for a period of 2 years.

During this period Intercede will provide the Customer with product upgrades and bug fixes for critical issues only. Product updates will not be available. Where possible, Intercede will provide guidance to work around an issue, for example, by undertaking configuration changes or modifying data. This may require the Customer having to schedule periodic maintenance tasks. Intercede will not usually consider further customizations to a deployment that is in the Limited Support period.

#### 8.1.3 End of Support

At the end of the *limited support* period, i.e. usually 5 years from general availability of the specific version of the product, support and maintenance will no longer be available. The Customer is expected to upgrade to the latest product version before the End of Support date is reached.

### 8.1.4 Extended Limited Support & Maintenance

The Limited Support & Maintenance period may be extended for a particular deployment, at Intercede's discretion. However, such an extension will incur a levy to be applied to the Support & Maintenance fees commencing on the renewal of S&M following the 5<sup>th</sup> anniversary of the product release. The levy is calculated as a 25% uplift of the underlying S&M fees for each additional year that Limited Support & Maintenance is agreed to be extended i.e. 25% for Year 1 with an additional 25% for Year 2, etc. For the avoidance of doubt, please note that this uplift is separate to any inflationary uplift as outlined in section 10.1.

For unique client customizations, additional costs may be applicable and are subject to separate pricing arrangements.

## 8.2 Feature Lifecycle

From time to time Intercede may need to stop supporting some features and capabilities of the MyID product. This may result in the feature not being present in later releases of the product. As a general rule, notice that a feature will no longer be supported is stated in the product's release notes. On occasions it may be necessary to issue an End of Support notice for a feature in relation to a currently supported version of the product. Examples are support for 3<sup>rd</sup> party components such as Certificate Authorities, smart cards etc.

### 8.2.1 Deprecated

Deprecated features are still available in the applicable release of software, but at a Limited Support level. Intercede will only provide critical bug fixes on a deprecated feature.

Marking an item as 'deprecated' is intended to give customers advanced warning a feature is likely to be no longer supported in a future release of the product and customers should plan to transition to a replacement feature or alternative solutions.

### 8.2.2 End of Sale

If a feature or capability has been flagged as being End of Sale, it means that the feature is not available for use in new deployments. Existing deployments upgrading to this version of the product may be able to continue to use the feature, however, there will be limited support available. The feature will become End of Support in a future product release.

### 8.2.3 End of Support

End of Sale features and capabilities are unlikely to be present in the product, even in upgraded systems, and therefore unavailable for use.

## 9 Exclusions

The following activities are not covered within the scope of the Support and Maintenance contract:

1. Usage of a MyID issued credential outside of the MyID system.
2. Issues with the use or configuration of 3<sup>rd</sup> Party Products. For example, configuration of a Certificate Authority.

Note. If an issue that manifests itself as a MyID problem is subsequently determined to be due to infrastructure or some other component that is not covered by this agreement, Intercede reserves the right to charge the Customer for time spent and any expenses incurred in Intercede's investigations.

## 10 Support and Maintenance Procurement

### 10.1 Renewal Procedure – MyID Enterprise & PIV

Support and Maintenance fees are payable annually in advance and are subject to an annual increase in line with inflation. Contact Intercede for more information.

If the Customer allows the agreement to lapse but then subsequently require Support, Intercede reserves the right to levy a reinstatement fee equivalent to one year's fee. If Support has lapsed, Intercede has no obligation to provide ongoing support until such time that additional coverage has been procured. Ad hoc support can be provided through chargeable Professional Services.

If the version of the product that the S&M relates to is in a limited support phase and Intercede has agreed to extend the limited support period, a levy will be applied, refer to section 8.1.4 **Error! Reference source not found.** for more information. The levy will not be applied to subsequent renewals if the production environment has in the meantime been upgraded to a supported product version.

### 10.2 Renewal Procedure - MyID Professional

Standard level of Support and Maintenance is included as part of the MyID Professional subscription. To ensure continued use of the MyID system and access to Customer Support, renewal of the subscription must be paid prior to the end of the current subscription period. Subscription fees are subject to an annual increase in line with inflation. Contact Intercede for more information.

Renewal of a MyID Professional subscription will commence from the day after the current subscription ends.

The Customer is encouraged to update their MyID Professional System regularly as software updates become available, typically every three (3) months. A subscription cannot be renewed if the system is running a version of MyID that more than two (2) years old.

### 10.3 Licensing of Test Environments – MyID Enterprise & PIV

Usually, a limited number of device licenses will be issued for a Test (non-production) environment that is valid for the period of the Support & Maintenance agreement. Renewal of the S & M agreement allows for the validity of the license to be extended. Note. Test environments require appropriate Server Licenses to be procured along with the associated S & M fees.

Customers on the Ultimate Support package will be eligible for complimentary licensing of two Test (non-production) environments with a quantity of devices equivalent to their Production environment. The license for these environments will be valid whilst ever the Ultimate Support package is in effect. If Ultimate Support is not renewed, providing appropriate server licenses have been purchased and a standard S&M agreement is active, an appropriate license can be issued with a reduced number of devices.

## 11 Licensing Implications When Upgrading MyID

When upgrading a MyID system, usually the existing database is utilized, allowing the upgraded system to continue to manage the users, devices & credentials that are already present. Existing configuration, audit logs etc will be retained. Intercede aims to ensure that the existing licence key continues to be valid, however on occasions the upgrade process may require a replacement license key to be applied. A replacement license key is obtained through [support@intercede.com](mailto:support@intercede.com).

### 11.1 Creating a New Database – MyID Enterprise & PIV

Rather than retaining the existing database, the customer may wish to stand up a fresh MyID deployment using the latest product version, which is then used for managing new credentials going forward. The original

deployment would need to be kept operational to manage existing credentials until such time that these have been replaced by credentials from the new deployment. In this scenario, both systems will need to be licensed whilst both remain operational.

Providing the existing Support & Maintenance contract remains active, Intercede will provide a temporary license for the new system for a period of up to three (3) months, free of charge. The number of users/devices licensed will be equivalent to the existing license. This is intended to provide time for the existing system to be decommissioned whilst using the new system.

If after three months, you are not in a position to decommission the original system, the temporary license can be extended by up to a further nine (9) months providing additional Support & Maintenance fees are paid for the extended period. The cost of the additional S&M will be a pro-rata of the existing S&M fees.

The temporary license cannot be extended beyond twelve (12) months. However, if the existing system is still required after this time, either a rental agreement needs to be purchased or licenses (and associated S&M) purchased for the new system. Contact your Intercede account manager for more information.

## 11.2 Creating a New Database – MyID Professional

Rather than retaining the existing database, if the customer wishes to stand up a fresh MyID deployment using the latest product version, a separate MyID Professional subscription will need to be purchased. Once the original system is no longer required, its subscription would not need to be renewed.

## Appendix A - Sample Certificate of Support & Maintenance Agreement

### Certificate of Support & Maintenance Agreement

This document states the details of the Support & Maintenance Agreement in relation to the MyID solution deployed at <End Customer>.

<b>End Customer</b>	<End Customer Name & Address>	
<b>Name of Deployment</b>	Internal Users MyID System	
<b>Technical Partner</b>	Direct.	
<b>Procurement Partner</b>	N/A	
<b>Period of Cover</b>	17 <sup>th</sup> May 2022 – 16 <sup>th</sup> May 2023	
<b>Level of Cover</b>	Standard – US Region	
<b>Supported Environments / License Type</b>	Production	Perpetual, 10,000 Users/Devices
	DR (Fail over)	As production
	Test environment	Time constrained to S&M renewal, 100 Users / Devices
<b>Variations to Default Level</b>	None	
<b>Health Check</b>	Not included.	
<b>Exclusions</b>	No exclusions	
<b>Special Conditions</b>	None	
<b>Products Purchased</b>	MyID Enterprise v11.8 (Latest Update) 1 x (production) server 2 x additional servers 10,000 Device Licenses (Perpetual, Production environment)	
<b>Product Customizations</b>	No customization. Advanced configuration undertaken by Professional Services.	
<b>Customer Points of Contact</b>	Support Person A: TBC Support Person B: TBC Support Person C: TBC Escalation: TBC Product Notifications: TBC	
<b>Notes</b>	1. Certificate issued due to contract renewal	