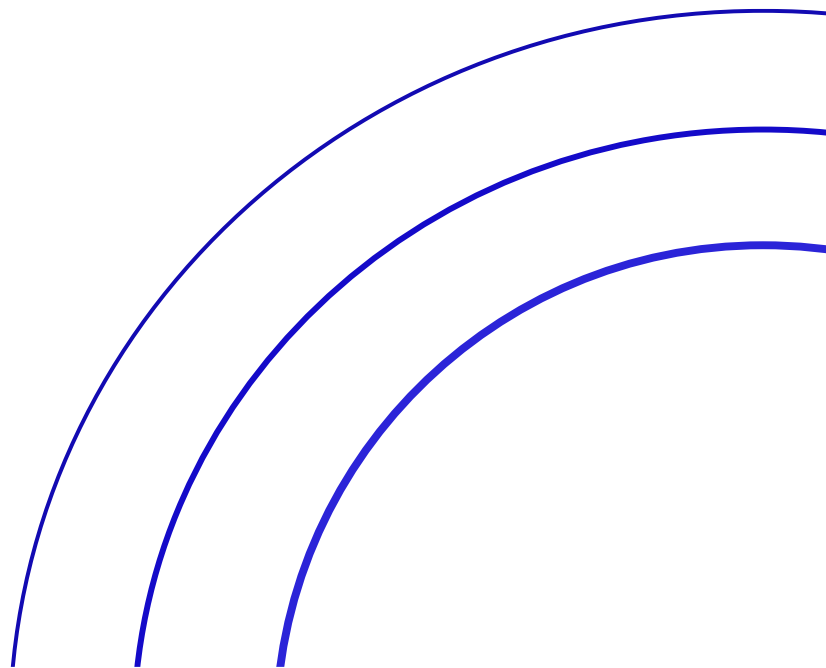




**Managed Thin Client Service
Description**



Document Control

| | | | |
|----------------------------------|--|--------------------------------|------------|
| TITLE: | Managed Thin Client Service Description | DOCUMENT REF NO: | QMS REC106 |
| DESCRIPTION: | This document defines the services provided by Calligo's Managed Thin Client service | | |
| OWNER/ AUTHORITY: | Director, Operations Management | VERSION NO: | 1.4 |
| DOCUMENT CROSS REFERENCE: | N/A | VERSION DATE: | 06/10/2023 |
| DISTRIBUTION METHOD | Email and Website | DOCUMENT CLASSIFICATION | Internal |

DOCUMENT OWNER & APPROVAL

The Director, Operations Management, is the owner of this document and is responsible for ensuring that this service description is reviewed in line with the review requirements of Calligo's Information Security Management System, Project Management Frameworks as well as the guidance and requirements of the CSSF.

Approved by the VP, Cloud Operations, Calligo ("Entity") on 25 November 2022

CHANGE HISTORY RECORD

| VERSION | DESCRIPTION OF CHANGE | AUTHOR | APPROVAL | DATE OF ISSUE |
|----------------|---|---------------------------------|----------------------|----------------------|
| 1.0 | Original Version | Director, Operations Management | VP, Cloud Operations | 25/11/22 |
| 1.1 | Remove Service Locations table and add link to external Service Locations document. | Director, Operations Management | VP, Cloud Operations | 10/01/23 |

| | | | | |
|-----|-----------------------------------|---------------------------------|----------------------|----------|
| 1.2 | Updated supporting document links | Director, Operations Management | VP, Cloud Operations | 20/02/23 |
| 1.3 | Updated Optional Offerings | Director, Operations Management | VP, Cloud Operations | 25/09/23 |
| 1.4 | Updated Optional Offerings | Director, Operations Management | VP, Cloud Operations | 05/10/23 |

1. Service Overview

This document defines the services provided by Calligo’s Managed Thin Client service. The Managed Thin Client service is one of a suite of services within the Calligo Operating Model.

Managed Thin Client is a managed Endpoint service that covers OS patching (Feature Updates, Quality Updates, Servicing Stack Updates, Critical and Security Updates) to maintain OS currency and Security for in support Windows OS versions in a Hosted Thin Client environment.

2. Service Inclusions

2.1. CO-ITSM-OSP

This service leverages Datto RMM and PowerBI to deliver patching and reporting to Windows OS assets.

2.2. CO-ITSM-SD

This service leverages an ITSM platform and trained Level 1 Service Desk Analysts to cover activities that provide a client facing Service Desk

2.3. CO-ITSM-MON

This service leverages Datto RMM and PowerBI to deliver monitoring and reporting for the in-scope service assets.

3. Service Provisions

3.1. CO-ITSM-OSP

3.1.1. Inclusions

| CO-ITSM-OSP | |
|--|---|
| Scope Item | Description |
| Monthly patching of systems running Windows OS currently supported by Microsoft | For supported OS versions: Deprecated OS versions require a separate Microsoft Extended Support Contract and a separate deployment agreement. Applicable patches are automatically approved unless otherwise agreed via Patch Advisory reporting and additional approval workflows. Critical, Monthly and Security updates are included as part of regular patch deployments. |
| Configuration and maintenance of deployment rules, settings, and deployment options. | Administration of rules, products, update classifications, agent settings Zero-day patch deployment |
| Consolidation of Monthly updates into cumulative updates and deployment of the cumulative updates. | Previous months applicable patches are consolidated into a single deployment to cover all patches in all previous deployments. These deployments are active with the current months deployments and follow the same schedule. |
| Maintenance of groups for systems in scope | Checking health and heartbeat of assigned assets in specific groups and schedules. |
| Exclusion of patches from deployment scope for known issues with the patch or resulting from testing during the pilot deployment | Removal of patches from deployment scope for known issues with the patch or as a result of testing during the pilot deployment. |
| Standard Reporting | Standard Monthly and regularly scheduled reports are included in this service. |

3.1.2. Exclusions

| CO-ITSM-OPS | |
|---|---|
| Exclusion Item | Description |
| The development of patch "work arounds" in the absence of an approved system vendor's patch. | This is a chargeable addition to the service and is priced on effort required as each mitigation or "work around" is unique. |
| Ad-hoc and /or custom patch reporting | This is a chargeable addition to the service and is priced on effort required. |
| Manual Patching of systems | This is a chargeable addition to the service and is priced on effort required. |
| Removal of patches from systems once installed | This is a chargeable addition to the service and is priced on effort required as backouts can vary and be unique. |
| Remediation or recovery of non-compliant systems caused due to existing OS issue. | The required patches are identified, downloaded and the installation is attempted but fails due to OS issues. Any troubleshooting beyond included remediation steps is a chargeable addition to the service. If the server blue screens due to applied patches during or immediately after patch installation, any troubleshooting beyond included remediation steps is a chargeable addition to the service. |
| Performing manual vulnerability remediation steps. | Manual steps required before or after automated patching windows is a chargeable addition to the service and is priced on effort required. This falls into the same area as "Manual patching of systems" above. |
| Compliance on assets added/removed without notification, or where configuration changes have been made to assets without submission via Change Management Process | Calligo needs to be informed in the form of a change record to the scope or configuration changes that could impact agent's health and the patching process. |

3.2. CO-ITSM-SD

3.2.1. Inclusions

| CO-ITSM-SD | |
|-------------------------------------|--|
| Scope Item | Description |
| Access to the Calligo ITSM platform | 24/7 access to the Calligo ITSM platform that provides capabilities for clients to raise new support tickets and to access open or historic support tickets. |
| Telephone Support | Access to the Calligo Service Desk via the issued telephone contact numbers during regional Business Hours only. |
| First Line Fix | Access to the Calligo L1 Service Desk Analysts for first line fix or resolution. |

3.2.2. Exclusions

| CO-ITSM-SD | |
|------------------------|--|
| Exclusion Item | Description |
| 24/7 Telephone Support | This is a chargeable addition. |
| Onsite support | All support delivered via the Service Desk offering is remote. |

3.3. CO-ITSM-MON

3.3.1. Inclusions

| CO-ITSM-MON | |
|---------------------|--|
| Scope Item | Description |
| Base OS Monitoring | Monitoring covers in-support Windows Server family operating systems |
| Resource Monitoring | The following items are currently within scope -CPU utilization |

| | |
|-------------------------|---|
| | -Memory (RAM) utilization -Disk utilization |
| Availability Monitoring | -RMM Agent heartbeat -URL availability |
| Remediation | -Remediation services to ensure all management functionality is operable -Remediation services to restore operability, or resolve service availability issues of monitored options |
| Service Monitoring | Monitoring of core OS and role services (defined as per service design) |

3.3.2. Exclusions

| CO-ITSM-MON | |
|--------------------------------|--|
| Exclusion Item | Description |
| End-of-Life OS | Microsoft OS that has passed end of support date and no extended support agreement exists |
| End user OS | Non-Windows Server OSes (e.g., Windows 10) |
| Non-OS application | 3 rd party software installed to a monitored system Troubleshooting of issues at the application level for applications related to services not provided by Calligo. |
| Licensing | Application or Server licensing expiration or renewal periods |
| Customer Internet Connectivity | Monitoring of external IP addresses for connectivity |
| Procurement | As part of remediation activities, procurement of required hardware or software is out of scope and requires a separate service agreement |
| Specific Functionality | Monitoring can detect if a system or service is available, but cannot validate full functionality |

4. Roles and Responsibilities

The table below provides a responsibility matrix for the core Managed Thin Client elements:

| Service Activities – Core Elements | Calligo | Customer |
|--|---------|----------|
| CO-ITSM-OSP | | |
| Business application verification, maintenance, and testing | C, I | R, A |
| Patch Deployment | R, A, C | |
| Defining standard recurring deployment schedules, exclusions, and targets | C, I | R, A |
| Compliance measurement for SLO/SLA purposes | R, A, C | I |
| Maintenance of SCEM collections for systems in scope | R, A, C | I |
| Add and remove systems to scope | R, A | C, I |
| Review released list of patches from Microsoft and provide customer notification prior to scheduled installation | R, A | C, I |
| Identify patches to be excluded and approve list of patches for deployment | C, I | R, A |
| Identify business areas that require patch reporting and provide contact information for recipients | C, I | R, A |
| Provide SMTP relay for subscription-based delivery of reports and alerts | C, I | R, A |
| Run reports on a scheduled basis and provide malware detection alerts | R, A | C, I |
| Identify patches to be excluded and approve list of patches for deployment | C, I | R, A |
| Identify business areas that require patch reporting and provide contact information for recipients | C, I | R, A |
| Provide SMTP relay for subscription-based delivery of reports and alerts | C, I | R, A |
| Run reports on a scheduled basis and provide malware detection alerts | R, A | C, I |
| CO-ITSM-SD | | |
| Raising support requests | R | R, A |
| Contacting Calligo Service Desk via telephone for P1 Support Requests | I | R, A |
| Correctly assigned the right category and priority to all incoming support requests | R, A | C, I |

| | | |
|---|------|------|
| Providing full and detailed information when creating new support requests | I | R, A |
| Providing detailed and regular ticket updates | R, A | I |
| Responding to all ticket updates where additional information or testing is requested from Calligo Service Desk | I | R, A |
| Providing prompt confirmation of ticket closure agreements. | I | R, A |

CO-ITSM-MON

| | | |
|---------------------------------|------|------|
| Configuring standard monitoring | R, A | C, I |
| Requesting monitoring changes | R, C | R, A |
| Responding to alerts | R, A | C, I |
| Remediation | R | R, I |

R=Responsible, A=Accountable, C=Consulted, I=Informed

5. Reporting

The table below provides details on the additional Monthly Reporting and Analytics for Managed Thin Client that are included in the core service:

| Service Item | Reporting Item | Description | Frequency |
|--------------|---|--|---|
| CO-ITSM-OSP | Asset lists (Deployment Collections) | List of all assets currently in scope as well as their current collection memberships and deployment windows | 1 Monthly. Sent a day after Patch Tuesday |
| CO-ITSM-OSP | Patch Advisory | The report lists all required patches that are scheduled for deployment. | 1 Monthly. Sent a day after Patch Tuesday |
| CO-ITSM-OSP | Pre-Patch Compliance Report | The report includes compliance summary and a list of non-compliant systems. | 1 per deployment. Sent prior to deployment. |
| CO-ITSM-OSP | Asset Compliance State (Current Cycle) | Current patch compliance state for the current month deployments. | 1 Monthly after deployment completion |
| CO-ITSM-OSP | Asset Compliance State (Cumulative Cycle) | Current patch compliance state for the cumulative (OS in support Date through Current – 1) deployments. | 1 Monthly after deployment completion |
| CO-ITSM-MON | Monitoring Performance | Average values of resource utilization for monitored systems during the previous period | Monthly |
| CO-ITSM-MON | Monitoring Alerts | Alerts raised during the previous period and current status (open or resolved) | Monthly |
| CO-ITSM-MON | Device Monitor status | List of configured monitors for each supported system | Monthly |

6. Data Residency

[Calligo Data Residency](#)

7. Service Requirements

| Service Item | Requirements Item |
|--------------|---|
| CO-ITSM-OSP | Current in support or Extended support Windows OS assets. |
| CO-ITSM-OSP | Deployment of Datto RMM agent and relevant firewall / access configurations for each in scope asset |
| CO-ITSM-OSP | An agreed and defined re-occurring maintenance window for automated patch installation and remediation activities |
| CO-ITSM-OSP | Reboots are permitted within the agreed maintenance windows. |
| CO-ITSM-OSP | Outbound internet access for monitoring and patching. |
| CO-ITSM-SD | Client is provided information on support access methods |
| CO-ITSM-SD | All Priority 1 incidents are logged, and the client must follow up with a telephone call into support. |

| | |
|--------------------|---|
| CO-ITSM-MON | Datto RMM Agent must be installed to all monitored assets |
| CO-ITSM-MON | Network connectivity and necessary access rules are required for all monitored assets |

8. Access Requirements

Requirements Item

Access to hosted servers is either by virtual private network (VPN) or dedicated communication links depending on Client requirements.

Administrative access to all assets in scope as required for remediation actions

Service account for Datto RMM agent activities

9. Support Locations

[Calligo Support Locations](#)

10. Service Catalogue Request Items

| Catalogue Item | Fulfilment Time | Qualifying Criteria | Included Requests |
|---|-----------------|---|-------------------|
| Add/Remove asset from scope | 8BHR | Supplied list of assets | 1 per week |
| Modify Patch categories | 24BHR | Supplied list of categories to modify and required changes. | 1 per week |
| On demand tracking of compliance states | 1BHR | Specific KB patch tracking submission | 1 Monthly |
| Monitoring Report | 48BHR | Provides data available from the platform | 1 per week |
| Additional service monitoring | 48BHR | Additional monitors may be added to existing systems | 1 per week |
| Modify alert recipients | 48BHR | Alert recipients may be adjusted to include client stakeholders | 1 per week |
| Modify alert thresholds | 48BHR | Client may request custom thresholds for an alert to be raised | 1 per week |

11. Standard SLO's

[Service-Level-Agreement.pdf \(calligo.io\)](#)

12. Related Documents

Supporting documents for this service:

Any clients onboarding to Calligo will require the following document as an introduction to service

[Calligo – Welcome to Support for Clients](#)

13. Optional Services

In addition to the Managed Thin Client service, Calligo can provide the following service items as optional add on services for Managed Thin Client:

13.1. Anti-Virus - Endpoints

Service Elements Scope

| SCOPE ITEM | DESCRIPTION |
|---------------------|---|
| Configuration | Deployment of Antivirus and Monitoring applications to all End Points Configuration of automatic update timing Configuration of End Point Protection e.g., Exemptions, End Point specific requirements, Computer/Endpoint Groups Initial Compliance Audit and Antivirus/Antimalware scans on all End Points Application Control Policies Web Control Policies Data Loss Prevention Policies |
| Initial Remediation | Remediation of any infection indicated endpoints |
| Define Reports | Setup initial reporting and provide access to client |
| Scanning | End user device scanning & remediation |
| Configuration | Deployment of Antivirus and Monitoring applications to all End Points Configuration of automatic update timing Configuration of End Point Protection e.g., Exemptions, End Point specific requirements, Computer/Endpoint Groups Initial Compliance Audit and Antivirus/Antimalware scans on all End Points Application Control Policies Web Control Policies Data Loss Prevention Policies |

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|------------------|---|
| End-of-Life OS | Microsoft and Apple OS that have passed end of support date, and no extended support agreement exists |
| Mobile devices | Web filtering does not extend to mobile phones (e.g., iOS or Android OS) |
| Personal devices | Personally owned devices are excluded from web filtering |
| Unsupported OS | Other OSes such as Linux, non-Windows hypervisors, or embedded systems |
| Personal Devices | Personally owned devices are excluded from End Point threat protection |

Service Requirements

| REQUIREMENTS ITEM |
|---|
| Endpoint security software must be installed to all protected assets |
| The Endpoint agent must be able to frequently connect to the internet in order to receive timely updates/policies and protection. |

Access Requirements

| REQUIREMENTS ITEM |
|---|
| Administrative access to in-scope devices to install Endpoint Security software |

Service Catalogue Items

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|---|-----------------|--|------------------------|
| Single Asset level Scan | 2BHR | Asset/endpoint name | 5/month per 50 users |
| Full Environment Asset Scan | 8BHR | Group or environment name | 4/month (as requested) |
| Computer Group Creation | 24BHR | Desired computer group name | 1/week |
| Computer Group Update | 24BHR | List of computers required in the group. | 1/week |
| Computer Group Policy Creation | 24BHR | Description of required policy | 1/month |
| Computer Group Policy Update | 24BHR | Description of required policy changes | 1/week |
| Create/Update Scanning Exclusion Policies | 24BHR | Description of required location/file exclusions | 1/week |

Standard Reporting

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|-----------------------------|---|-----------|
| Endpoint Protection Summary | Total Threats blocked, Assets protected, Users Protected (Max 30 days) | 1/Month |
| Licenses and Usage | List of Endpoint licenses | 1/Month |
| Computer Report | Online Status, Last User, Last Update, Computer Group, Agent Install Status | 1/Month |
| Websites blocked and warned | Effectiveness of web control policies | 1/month |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|------------------------------------|---------|----------|
| Install endpoint security software | R, A, C | A |
| Single Asset Level Scan | R, A | C, I |
| Full Environment Asset Level Scan | R, A | C, I |
| Request Computer Groups/Change | C | R, A |
| Computer Group Creation/changes | R, A | I |
| Request Policy Creation/Updates | C | R, A |
| Policy Creation/Updates | R, A | I |
| Report Creation | R, A | I |
| Initial Virus/Malware Remediation | R, A | C, I |

R=Responsible, A=Accountable, Consulted, I=Informed

13.2. M365 Applications

Service Elements Scope

This element of the service leverages Microsoft 365 applications and tooling for end user configuration.

| SCOPE ITEM | DESCRIPTION |
|---|---|
| Remote Administration | Microsoft 365 application download and basic application support limited to the User being able to open and use the application on supported workstations or mobile devices (as defined in the Supported Applications List) |
| Microsoft 365 Health Monitoring | Monitoring and client alerting for M365 systemic outages and impact |
| Microsoft 365 License Provisioning | Assignment of relevant end user licenses. |
| Microsoft 365 User Management | The following activities are supported: <ul style="list-style-type: none"> • Moves • Adds • Changes • Deletes |
| Supported Applications | The following M365 applications are included for support: <ul style="list-style-type: none"> • Microsoft Word • Microsoft Excel • Microsoft PowerPoint • Microsoft Teams • Microsoft Outlook • Microsoft OneDrive • Microsoft SharePoint |
| Microsoft 365 mailbox management | Configuration of forwarding rules, permissions, and aliases |
| (M365 Application Patching Tooling) Monthly patching of systems running in scope Office applications currently supported by Microsoft | For supported OS versions: Deprecated OS versions require a separate Microsoft Extended Support Contract and a separate deployment agreement. Applicable patches are automatically approved unless otherwise agreed via Patch Advisory reporting and additional approval workflows. Critical, Monthly and Security updates are included as part of regular patch deployments. |
| (M365 Application Patching Tooling) Configuration and maintenance of deployment rules, settings, and deployment options. | Administration of rules, products, update classifications, agent settings Zero-day patch deployment |
| (M365 Application Patching Tooling) Consolidation of Monthly updates into | Previous months applicable patches are consolidated into a single deployment to cover all patches in all previous deployments. These deployments are active with the current months deployments and follow the same schedule. |

| SCOPE ITEM | DESCRIPTION |
|--|---|
| cumulative updates and deployment of the cumulative updates. | |
| (M365 Application Patching Tooling) Maintenance of groups for systems in scope | Checking health and heartbeat of assigned assets in specific groups and schedules. |
| (M365 Application Patching Tooling) Exclusion of patches from deployment scope for known issues with the patch or resulting from testing during the pilot deployment | Removal of patches from deployment scope for known issues with the patch or as a result of testing during the pilot deployment. |
| (M365 Application Patching Tooling) Standard Reporting | Standard Monthly and regularly scheduled reports are included in this service. |
| (M365 Application Patching Update Channel) | Configuration of update channels: <ul style="list-style-type: none"> • Current Channel • Monthly Enterprise Channel • Semi-Annual Enterprise Channel • Semi-Annual Enterprise Channel (Preview) |

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|--|---|
| Required Licensing | This element of service requires SI: CO-SW-LICENSE |
| Provision and management of Two-Factor Authentication (2FA) | This element of service requires SI: CO-CP-MFA |
| Unsupported Applications | The following M365 applications are not included for support: <ul style="list-style-type: none"> • Microsoft Access • Microsoft Publisher • Microsoft Intune • Microsoft Azure Information Protection • Microsoft Exchange (Exchange Online) • Microsoft Teams Voice (Requires SI: CO-ITSM-BV) • PowerBI |
| The development of patch “work arounds” in the absence of an approved system vendor’s patch. | This is a chargeable addition to the service and is priced on effort required as each mitigation or “work around” is unique. |
| Ad-hoc and /or custom patch reporting | This is a chargeable addition to the service and is priced on effort required. |
| Manual Patching of systems | This is a chargeable addition to the service and is priced on effort required. |
| Removal of patches from systems once installed | This is a chargeable addition to the service and is priced on effort required as backouts can vary and be unique. |
| Remediation or recovery of non-compliant systems caused due to existing OS issue. | The required patches are identified, downloaded and the installation is attempted but fails due to OS issues. Any troubleshooting beyond included remediation steps is a chargeable addition to the service. If the server blue screens due to applied patches during or immediately after patch installation, any troubleshooting beyond included remediation steps is a chargeable addition to the service. |
| Performing manual vulnerability remediation steps. | Manual steps required before or after automated patching windows is a chargeable addition to the service and is priced on effort required. This falls into the same area as “Manual patching of systems” above. |
| (M365 Application Patching Update Channel) Standard Reporting | Currently there is no supported reporting export for version compliance. Dashboard visual is the only representation. <i>Note: This item will be revisited on a regular basis for improvements to this service element.</i> |

Service Requirements

| REQUIREMENTS ITEM |
|--|
| All applicable M365 licenses Current in support or extended support Windows OS assets. Deployment of Datto RMM agent and relevant firewall / access configurations for each in scope asset |

An agreed and defined re-occurring maintenance window for automated patch installation and remediation activities
 Reboots are permitted within the agreed maintenance windows.
 Outbound internet access for reporting and patching.

Access Requirements

| REQUIREMENTS ITEM |
|---|
| Administrative (Local) access to all assets in scope as required. |
| Required Administrative rights to client M365 Tenant. |
| Service Account for Datto RMM agent activities |

Service Catalog Request Items

This table represents the items and frequency that can be requested during the service cycle.
 Note: Additional requests are chargeable and are priced on effort required.

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|-----------------------------|-----------------|---|-------------------|
| Mailbox Migrations | 40BHR | Customer supplied list of mailboxes to migrate. May require project scheduling depending on size and scope of request. | 1 Monthly |
| Add/Remove asset from scope | 8BHR | Supplied list of assets | 1 per week |

Standard Reporting

This table represents the standard reports included in **CO-ITSM-M365APP** as well as the deliverable frequency.

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|--|--|--|
| M365 usage | Mailbox sizing, OneDrive sizing and assigned licenses. | 1 Monthly |
| OneDrive External Sharing | Lists of current external OneDrive shares | 1 Monthly |
| Security and Compliance reporting | Office 365 Secure Score, DLP Policy | 1 Monthly |
| (M365 Application Patching Tooling) Asset lists (Deployment Collections) | List of all assets currently in scope as well as their current collection memberships and deployment windows | 1 Monthly Sent a day after Patch Tuesday |
| (M365 Application Patching Tooling) Patch Advisory | The report lists all required patches that are scheduled for deployment. | 1 Monthly. Sent a day after Patch Tuesday |
| (M365 Application Patching Tooling) Pre-Patch Compliance Report | The report includes compliance summary and a list of non-compliant systems. | 1 per deployment. Sent prior to deployment. |
| (M365 Application Patching Tooling) Asset Compliance State (Current Cycle) | Current patch compliance state for the current month deployments. | 1 Monthly after deployment completion |
| (M365 Application Patching Tooling) Asset Compliance State (Cumulative Cycle) | Current patch compliance state for the cumulative (OS in support Date through Current – 1) deployments. | 1 Monthly after deployment completion |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|---|---------|----------|
| Microsoft 365 application download and basic application support limited to the User being able to open and use the application on supported workstations or mobile devices (as defined in the Supported Hardware & Software List on Calligo's website) | R, A, C | I |
| Configuration of the MS Outlook client on supported workstations and mobile devices (as defined in the Supported Hardware & Software List on Calligo's website). | R, A, C | I |
| Microsoft 365 health monitoring | R, A, C | I |
| Microsoft 365 license provisioning | R, A | C, I |

| SERVICE ACTIVITIES | Calligo | Customer |
|---|---------|----------|
| Microsoft 365 user management (moves, adds, changes, deletes) | R, A | C, I |
| Microsoft 365 mailbox management (forwarding, permissions, aliases) | R | A, C, I |
| Business application verification, maintenance, and testing | C, I | R, A |
| (M365 Application Patching Tooling) Patch Deployment | R, A, C | |
| Defining standard recurring deployment schedules, exclusions, and targets | C, I | R, A |
| (M365 Application Patching Tooling) Compliance measurement for SLO/SLA purposes | R, A, C | I |
| Add and remove systems to scope | R, A | C, I |
| Review released list of patches from Microsoft and provide customer notification prior to scheduled installation | R, A | C, I |
| (M365 Application Patching Tooling) Identify patches to be excluded and approve list of patches for deployment | C, I | R, A |
| Identify business areas that require patch reporting and provide contact information for recipients | C, I | R, A |
| (M365 Application Patching Tooling) Run reports on a scheduled basis and provide malware detection alerts | R, A | C, I |
| (M365 Application Patching Tooling) Identify patches to be excluded and approve list of patches for deployment | C, I | R, A |
| (M365 Application Patching Tooling) Identify business areas that require patch reporting and provide contact information for recipients | C, I | R, A |
| Run reports on a scheduled basis and provide malware detection alerts | R, A | C, I |

R=Responsible, A=Accountable, C=Consulted, I=Informed

13.3. Application Currency

Service Elements Scope

This element of the service leverages tooling to provide updates to existing deployed supported applications.

| SCOPE ITEM | DESCRIPTION |
|--|--|
| Monthly patching of Applications in scope for third-party updates | For supported OS versions: Windows 7 and above. Windows 7 requires a separate Microsoft Extended Support Contract. Third-party applications are patched using vendors catalogues or third-party tools |
| Administration of Third-party catalogues, products, update classifications, agent settings | Configuration and maintenance of third-party update catalogues, deployment rules, Datto agent settings and deployment options. |
| Installation and configuration of Third-party update tools or add-ons | If required, third-party update tools or add-ons will be installed and configured to provide application currency |
| Service Catalog Items | A standard list of requestable items included in this service. |

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|--|--|
| Updates for Applications not available by 3 rd party tools or add-ons | This is a chargeable addition to the service and is priced on effort required. These applications are updated using Application deployment and package creation. |

| | |
|----------------------------|--|
| Manual patching of systems | This is a chargeable addition to the service and is priced on effort required. These applications are updated using Application deployment and package creation. |
|----------------------------|--|

Service Requirements

| REQUIREMENTS ITEM |
|---|
| Datto RMM agent installed on all in scope assets. |
| CO-ITSM-OPS, Workstation OS Patching is required as the configuration and deployments are utilized as core functionality. |
| Third-party update tools or add-ons, if needed |

Access Requirements

| REQUIREMENTS ITEM |
|---|
| Datto RMM agent installed on all in scope assets |
| Local Administrator access to all systems in scope is required for troubleshooting and remediation actions. |

Service Catalogue Items

This table represents the items and frequency that can be requested during the service cycle. Requests are chargeable and are priced on effort required.

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|---|-----------------|---|-------------------|
| On demand tracking of compliance states | 8BHR | Specific KB patch tracking submission | 1 Monthly |
| Request for not supported applications to Catalog | 24BHR | Submitted application required and may not be supportable upon investigation. | 1 Weekly |

Standard Reporting

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|---|--|---|
| Asset lists (Deployment Collections) | List of all assets currently in scope as well as their current collection memberships and deployment windows | 1 Monthly. Sent a day after Patch Tuesday |
| Patch Advisory | The report lists all required patches that are scheduled for deployment. | 1 Monthly. Sent a day after Patch Tuesday |
| Pre-Patch Compliance Report | The report includes compliance summary and a list of non-compliant systems. | 1 per deployment. Sent prior to deployment. |
| Asset Compliance State (Current Cycle) | Current patch compliance state for the current month deployments. | 1 Monthly after deployment completion |
| Asset Compliance State (Cumulative Cycle) | Current patch compliance state for the cumulative (OS in support Date through Current – 1) deployments. | 1 Monthly after deployment completion |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|--|---------|----------|
| Business application verification, maintenance, and testing | C, I | R, A |
| Patch Deployment | R, A, C | - |
| Defining standard recurring deployment schedules, exclusions, and targets | C, I | R, A |
| Compliance measurement for SLO/SLA purposes | R, A, C | I |
| Maintenance of Datto collections for systems in scope | R, A, C | I |
| Add and remove systems to scope | R, A | C, I |
| Review released list of patches from Microsoft and provide customer notification prior to scheduled installation | R, A | C, I |
| Identify patches to be excluded and approve list of patches for deployment | C, I | R, A |
| Identify business areas that require patch reporting and provide contact information for recipients | C, I | R, A |
| Identify patches to be excluded and approve list of patches for deployment | C, I | R, A |
| Identify business areas that require patch reporting and provide contact information for recipients | C, I | R, A |
| Submission requests for additional, not currently supported applications | R, C | A, I |

R=Responsible, A=Accountable, Consulted, I=Informed

13.4. Licensing

This element of the service leverages licensing.

Service Elements Scope

| SCOPE ITEM | DESCRIPTION |
|----------------------------|--|
| Client Agreement | Creation of a Customer Agreement, between the client and Application, or OS Vendor |
| Manage licenses | Management of products and service subscription licenses |
| Billing Support | Provide billing support from application or OS vendor |
| Manage Tenant Subscription | Managed subscription changes on behalf of the Client |
| Reporting | Provide license total / usage |
| Invoicing | Invoice creation and delivery |

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|---|---|
| Installation of software | This element of service is described in SI: CO-ITSM-SD |
| Tracking of client licensing compliance | Client is responsible for maintaining licensing compliance on applications and OS |

Service Requirements

| REQUIREMENTS ITEM |
|-------------------|
| N/A |

Access Requirements

| REQUIREMENTS ITEM |
|--|
| Access to customer licensing portal for application or OS vendor |

Service Catalogue Request Items

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|-------------------------------------|-----------------|---|-------------------|
| Vendor or Application license Audit | 40BHR | Client ticket submission for all applications and OS licenses | 1 Monthly |
| License quote | 40BHR | Provide quote of software licenses required as requested. | 1 Weekly |

Standard Reporting

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|----------------------------|---------------------------------------|-----------|
| License Consumption report | Report of current license(s) purchase | 1 Monthly |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|---|---------|----------|
| Create a valid Customer Agreement between Application or OS vendor and Client | R, A | I |
| Accurate count of licenses required | A | R |
| Request changes to subscription being managed | I | R, A |
| Provide subscription billing invoices for managed subscriptions | R, A | I |
| Payment of subscription invoices from Calligo | I | R, A |

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13.5. BaaS – Office 365

This element of the service leverages backup tooling to provide M365 User Level Backups.

Service Elements Scope

| SCOPE ITEM | DESCRIPTION |
|----------------------------------|---|
| Mailbox Backup (Exchange Online) | Copy of all user's mailboxes including archive mailboxes and shared mailboxes |
| SharePoint Backup | Copy of all SharePoint data including custom web parts. |
| Teams | Copy of all Teams Sites, including team chat data and files shared within Teams |
| OneDrive Backup | Copy of any OneDrive for Business. |

| | |
|---------|---|
| Storage | Up to 30GB per User Account. Additional storage above 30GB available at an additional cost. |
|---------|---|

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|----------------------|--|
| Unlicensed users | Service is unable to backups unlicensed users. |
| Project Web Apps | Not supported. |
| Microsoft Teams data | Current exclusions for Teams: <ul style="list-style-type: none"> Private and shared channels One-on-one and group chats Audio and video calls Video recordings saved to Microsoft Stream Contacts Code snippets in posts Data of applications added as channel tabs (such as Website, Planner, Word, Excel, PowerPoint, Visio, PDF, Document Library, OneNote, SharePoint, Stream, Forms, Power BI, Power Automate and Azure DevOps) and other 3rd party applications if their data does not reside in the SharePoint document library of the team |
| OneNote | Backups for OneNote, if size is more than 2 GB is currently not supported. |
| Storage | Storage requirements above 30GB unless previously agreed and provisioned at an additional cost. |

Service Requirements

| REQUIREMENTS ITEM |
|-------------------|
| N/A |

Access Requirements

| REQUIREMENTS ITEM |
|---|
| For initial configuration of the service an account with the Global Admin role is required, after install and setup the accounts permissions can be updated to have the roles listed below. |
| Service Account (Standard Calligo Naming Convention) with the following roles for SharePoint (SharePoint Admin, View-only Configuration & View-Only Recipients) for Teams (Team Administrator) |
| Service Account requires a license with access to the Teams API (Minimum Microsoft Teams Exploratory experience) |

Service Catalogue Request Items

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|-------------------------------------|-----------------|--|-------------------|
| Add or remove a user from the scope | 24BHR | users may be added or removed from the scope. Must be raised as a ticket in Viaje | 1 weekly |
| Changes to the retention policy | 24BHR | Must be raised as a ticket in Viaje | 1 monthly |
| Restore request | 8BHR | Must be raised as a ticket in Viaje | As required |

Standard Reporting

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|----------------------|-------------|------------|
| Client Storage Usage | As Required | On Request |
| Client License Usage | As Required | On Request |

Supporting Documentation and Details

| Policy Name | Total Retention Period |
|-------------|------------------------|
| Policy 1 | 1 Year |
| Policy 2 | 2 Year |
| Policy 3 | 3 Year |
| Policy 4 | Keep Forever |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|--------------------|---------|----------|
|--------------------|---------|----------|

| | | |
|--|------|------|
| Backup Retention Specification | C | R, A |
| Backup Retention Configuration | R, A | C |
| Request to add or remove a user from the scope | C | R, A |
| Management of users | R, A | C |
| Backup Checks | R, A | I |
| Restore Test | R, A | I |

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13.6. Service Delivery Manager

This element of the service leverages an experienced Calligo Service Delivery Manager to assist with service management requests, reporting, escalations and technical advice and guidance as needed.

Service Element Scope

| SCOPE ITEM | DESCRIPTION |
|-------------------------|--|
| Service Review Meetings | Regular meetings between the key stakeholders for the client and Calligo Service Delivery Managers to review an agreed set agenda, including Service Performance, Project Updates, Calligo Company Updates. |
| Service Reporting | Regular reports covering support ticket summary and performance against Service Levels, Availability and Capacity management (where applicable), Operations Management performance against Service Level Objectives. |
| Technical guidance | Access to business hours technical guidance and support to ensure customer's success, bringing Calligo's best ideas, standards, innovations, and capabilities to customers to drive maximum business value. Educate Calligo clients on how existing and new product features and functionality work, and how it can contribute to their business growth |
| Escalation contact | Calligo point of contact during Business hours for support requests and accounts escalations. |

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|----------------|--|
| 24/7 | Access to Service Delivery Managers is during business hours only. |

Service Requirements

| REQUIREMENTS ITEM |
|---|
| All support tickets are logged via the Calligo ITSM system by clients. |
| All Service Review reports are generated via Calligo Reporting dashboards |
| Access to client's key stakeholders and decision makers |

Access Requirements

| ACCESS REQUIREMENTS |
|---------------------|
| N/A |

Service Catalogue Request Items

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|-----------------|-----------------|----------------------------------|-------------------|
| Review Meetings | 1 Week | No previous review in past month | |

Standard Reporting

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|------------------------|--|---|
| Service Review Reports | Covering support ticket summary and performance against Service Levels, Availability and Capacity management (where applicable), Operations Management performance against Service Level Objectives. | Monthly generated |
| Incident Reports | Providing Incident Reports for all major Incidents to outline the root cause and future mitigation to avoid reoccurrence. | For all P1 Incidents impacting the client |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|--|---------|----------|
| Producing and delivering Service Reports | A, R | C, I |
| Scheduling and managing Service Review Meetings | A, R | C, I |
| Obtaining client feedback on Service levels | A, R | C, I |
| Providing feedback on Calligo Service levels | C, I | A, R |
| Providing management and oversight on active client projects | A, R | C, I |
| Delivery of Incident Reports and post incident review meetings | A, R | C, I |
| Approval for changes in service scope | C, I | A, R |

R=Responsible, A=Accountable, Consulted, I=Informed

13.7. Technical Account Manager

This element of the service leverages an experienced Calligo Technical Account Manager to assist with technical requests, reporting, escalations, and ongoing technical advice to help drive and direct client's strategy and need for information technology.

Service Elements Scope

| SCOPE ITEM | DESCRIPTION |
|-------------------------|---|
| Service Review Meetings | Regular meetings between the key stakeholders for the client and Calligo to review an agreed set agenda, including Service Performance, Project Updates, Client IT Strategy roadmap, Calligo Company Updates. |
| Service Reporting | Regular reports covering support ticket summary and performance against Service Levels, Availability and Capacity management (where applicable), Operations Management performance against Service Level Objectives. |
| Technical guidance | Access to business hours technical guidance and support to ensure customer's success, bringing Calligo's best ideas, standards, innovations, and capabilities to customers to drive maximum business value. Educate Calligo clients on how existing and new product features and functionality work, and how it can contribute to their business growth. |
| Escalation contact | Calligo point of contact during Business hours for support requests and account escalations. |

Service Provision Excludes

| EXCLUSION ITEM | DESCRIPTION |
|-------------------------|---|
| 24/7 | Access to Technical Account Managers is during Business Hours only as specified in the MSA. |
| Implementation services | This service does not include activities that would be classified as development or project work. |

Service Requirements

| REQUIREMENTS ITEM |
|--|
| All support tickets are logged via the Calligo ITSM system by clients. |

Access Requirements

| REQUIREMENTS ITEM |
|--|
| Administrative access to all assets in scope as required for remediation actions |

Service Catalogue Request Items

| CATALOG ITEM | FULFILMENT TIME | QUALIFYING CRITERIA | INCLUDED REQUESTS |
|----------------|-----------------|---------------------|-------------------|
| Not applicable | | | |

Standard Reporting

| REPORTING ITEM | DESCRIPTION | FREQUENCY |
|------------------|---|---|
| Incident Reports | Providing Incident Reports for all major Incidents to outline the root cause and future mitigation to avoid reoccurrence. | For all P1 Incidents impacting the client |

RACI Table

| SERVICE ACTIVITIES | Calligo | Customer |
|--------------------|---------|----------|
|--------------------|---------|----------|

| | | |
|--|------|------|
| Producing and delivering Incident Reports and post incident review | A, R | I |
| Scheduling and managing technical roadmap Review Meetings | A, R | C, I |
| Obtaining client feedback on Service levels and Performance | A, R | C |
| Providing feedback on Calligo Service levels and Performance | I | A, R |
| Providing technical oversight on active client projects within scope | A, R | C, I |
| Approval for changes in service scope | C, I | A, R |

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14. Auxiliary Services

14.1. Service Onboarding & Transition

To launch Managed Thin Client service successfully, service design, onboarding and transition will be required to prepare and test both the environment and the managed services processes. Calligo will undertake several workshops to discuss and confirm each element of the service to ensure all parties are aware of roles and responsibilities in advance of service launch.

Service transition and onboarding covers areas such as ticket management setup, platform readiness with knowledge share, and finalising all ITIL practices. A test and acceptance criteria are captured and signed off, to allow for the Managed Thin Client service to commence.

After service launch, Calligo uses a formal service transition framework as the basis to carry out acceptance into service procedures, for new services landing into managed services. We typically engage at the initial stages of a project to ensure service operation adoption and readiness is planned and carried out correctly. This materializes as follows:

- To review designs, build and test artefacts to ensure supportability.
- Attend change review boards to gain early sight of changes by way of knowledge acquisition.
- To witness and validate designs and builds are delivered as proposed and intended.
- Complete operational into service documentation, training and runbook enablement, which is required as part of the service hand-over.

14.2. Change Request and Change Control Process:

All infrastructure changes introducing risk to the environment will require change control which includes, but not limited to, Microsoft Security Patching, Infrastructure Upgrades, Deployments, Configuration Item status change. This can be generated from maintenance or an event such as an upgrade required on the system released by Third Party vendors, requested by the customer, or from a monthly release of security patches.

Where possible Standard Changes will be used with minimal risk, repeatable implementation steps, and prior approval from the customer in the form of an email.

An Emergency, or unplanned, change process will be raised to resolve a Priority 1 or 2 incident or to implement an emergency Security Patch. This accelerates the time to implement and resolve.

All Requests for Change will be reviewed internally, assessed internally and authorized or rejected through Calligo ITSM tool.

14.3. Superseded patch scenarios

This relates to the behavior which occurs when a newer update is released after the patch cycle has started:

- **Revisions** - When a metadata only revision to an update is made, the update identified in the deployment is still installed. There is no new update released by the vendor for this. Updates with material changes (binaries) are considered superseded updates and the supersede rule applies.
- **Supersede** - When the update source marks an included patch as superseded, the superseded update will not be installed. The newer update will need to be included at a future patch cycle.
- **Expiration** - At the time of installation, when a patch has been included for installation but is marked as expired by Windows Update, the install of that patch will not occur. The asset will report compliant since the patch no longer meets the requirements to install. Where a newer update becomes available it will need to be included on a future patch cycle.