



## PTC CLOUD OFFERING SPECIFIC PROVISIONS

### About this Document

This document sets out various terms and conditions that are specific to defined Cloud and SaaS offerings from PTC. This document supplements the more general terms set forth in the PTC Cloud Services Terms and Conditions (the “General Terms and Conditions”). In the event of inconsistency between this document and the PTC quote(s) pursuant to which the Customer purchased the Services (the “Quote”), the Quote shall govern. PTC reserves the right to change the terms of this document upon no less than sixty days notice, with such changes effective upon the next renewal of the Customer’s term; provided that Customer may opt to not renew its contract in accordance with the non-renewal terms in the Quote.

Notwithstanding the above, Vuforia Cloud Recognition Services are governed by the license agreement at <https://www.ptc.com/en/documents/legal-agreements/on-premise-license-agreements>.

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## Definitions/Provisions Applying to All Offerings

### Common Definitions

The following terms have the following meanings. Other capitalized terms used in this document but not defined herein are as defined in the General Terms and Conditions.

“**Active Daily User**” means a unique user who accesses the Hosted System at any time during a 24-hour calendar day, using the time zone set for the Hosted System.

“**Monthly Active User**” means a unique user who accesses the Hosted System during a particular calendar month.

“**Registered User**” means an individual, named registered user on a password basis. The Customer may add and/or substitute from time to time new Registered Users as long as the aggregate number of Registered Users does not exceed at any point in time the number of licenses in effect at such time for that particular product and, provided further, that if a person who was previously a Registered User returns to Registered User status, a new license fee must be paid to PTC at PTC’s then current rates.

“**Service End Date**” means the date, once it is known, when the Services term will expire or terminate. That is, the Service End Date will be known when a non-renewal notice has been given or a party has given notice that it will terminate the Services term in accordance with the termination provisions of the General Terms and Conditions.

For the sake of simplicity, references in this document “SaaS” means both SaaS and Managed Services. See the General Terms and Conditions for definitions of these two terms.

### General Exclusions

#### PTC Cloud Management of Software Applications on a Customer Infrastructure

All components for PTC Managed Services offerings and SaaS offerings are hosted by PTC on PTC’s infrastructure and unless specifically agreed in writing, PTC does not manage offerings or parts of offerings on the Customer’s infrastructure, whether Customer IT centers, Customer leased private data centers, or Customer accounts on public infrastructure such as Amazon Web Services or Microsoft Azure cloud platforms.

#### System Performance

End user performance testing is not included in any Service. PTC will make commercially reasonable efforts to optimize performance of hosted environments and accessibility to the Internet. However, PTC does not control Customer’s access to external internet (WAN), nor does PTC control Customer’s practices for data creation that may impact the offerings’ overall responsiveness.

#### Customer Use of Non-production Environments

Any non-production environments purchased cannot be used for production purposes. Identified production environments shall be used for production data and access, and are the only environments where the uptime SLAs will apply. Non-production environments (e.g., development, integration, QA or other name may apply) do not include comparable backup, disaster recovery and other services that apply to production environments.

#### Custom Implementation Services

The services do not include post-installation implementation services such as business configuration and customization of a deployed solution specific to a Customer unique requirement set.

#### Security Exclusions

Execution of a Customer security audit or review is excluded from all offerings unless paid-for as an additional service. Depending on the availability of PTC’s security resources, PTC may not accommodate all requests for paid audit/review engagements.

#### Data Migration/Loading

Services to provide data migration/loading into the PTC Cloud environments (e.g., materials and document files) are not included unless specifically referenced in the Quote.

#### Single Sign On

Setup and implementation of single-sign-On services are not included unless specifically purchased via an available PTC offering or otherwise agreed in writing.

### Support for Regulated Industries

Regulated industries such as medical device manufacturing and military defense product manufacturing may have unique requirements for defining, tracking and managing access, security and changes to solution environments, and/or for FDA validation. PTC can for some



offerings support customers who must adhere to these requirements, but entitlement to this type of support must be explicitly purchased and is otherwise excluded. See below for details.

### **Overage**

Unless specified below for a particular offering, the following items are subject to overage fees (at the rates specified in the Quote) if Customers exceed their allowances:

- Number of users
- Data/Storage
- Named Service Requests

### **Service Requests**

Each offering entitles Customers to a particular number of Named Service Requests per calendar year. For most offerings, the number is twelve, but for offerings that are supplemental to other offerings (such as ThingWorx Navigate), there may be additional Service Requests provided. Additional Named Service Request entitlements can be purchased. Service Requests are described in PTC Support Services Terms and Conditions.

Named Service Requests will deprecate Customer's entitlement. The following Service Request types are specifically excluded from consumption metrics relating to Named Service Requests and will not deprecate the entitlement:

- Deployment of a required security patch either for PTC applications or underlying infrastructure
- Installation of PTC provided solution components purchased as part of any PTC offering
- Information requests relating to solution consumption or in support of an incident or triage activity
- Assistance with User Administration for actions that cannot be accessed directly by the Customer in the secured Production Environment

If a Customer exceeds the number of entitled Named Service Requests, PTC will contact the Customer to give Customer the opportunity to accept or decline an overage fee. Customers will be provided a monthly report to understand their consumption to date.

### **New Releases and Upgrades**

Customers are expected to run on current supported and PTC Cloud compatible versions of software. PTC will enforce a requirement to upgrade to a suitable version per the terms set forth in the PTC Support Services Terms and Conditions.

### **Data Export**

Once the Service End Date is known, the Customer can request up to two data exports: (1) prior to Service End Date an export for purposes of testing the input of that data into Customer's new system, and (2) final export at Service End Date. The Customer shall coordinate such requests with PTC. The data export includes the information required to redeploy the as-is software configuration in another environment. The file format(s) that are available for each offering are as set forth in the offering-specific sections below.

Other than as set forth above, export and snapshot of Hosted Data (e.g., for Customer's long-term retention needs) are not offered as part of the standard PTC offering. Customer may, however, contract with PTC for additional non-standard data export for additional fees.

PTC will retain Customer's Hosted Data for approximately 30 days following the last extraction after which time it will be destroyed. One copy of archived data can be provided during this 30-day period upon customer request.



## PTC Extended Cloud Services Offering (“ECS”)

### Introduction

The ECS Support Service provides for the management, deployment and Verification (as defined below) of customizations and integrations. ECS extends the standard service to provide for hosting of a Customer’s customizations and integrations (collectively, “Customizations”). However, it does not include modification, enhancement or repair of these Customizations.

### Solution Scope

As part of ECS, PTC will provide:

- Application Customization installation
- Verification that Customizations have installed without error

“Verification” is defined as basic steps to validate that a Customization has been installed properly and is functioning (e.g., a custom UI comes up). It does not provide for business use case verification or feature specific verification.

ECS does not include troubleshooting or debugging of ECS Customizations.

### Offering Basis

- ECS is contracted on a per Customization basis.
- PTC has the right to refuse any Customization. If PTC refuses a Customization, PTC will inform the Customer of the reason(s) for such refusal to give the Customer an opportunity to provide an updated release.
- It is important to note that the following items are not included as part of ECS:
  - Code changes required to resolve an issue or introduce new functionality
  - Customization changes following upgrades or maintenance releases or standard service enhancements
  - Data modifications
  - Customization development or consulting
  - Monitoring of Customizations
  - Services for Customizations not deployed within a PTC hosted application
- Upon Customer updating a Customization, PTC has the right to review the Customization to ensure it falls within the agreed scope of the existing Customization. If the Customization has expanded beyond the scope of the initial agreed upon baseline, PTC may require additional ECS fees to support the expanded scope.
- Upon upgrade of the Customer solution, Customer is responsible for upgrading any existing Customizations if there are any issues found during the upgrade process.

### Solution Service Model

To utilize ECS, Customer is expected to provide the following components for each Customization.

- Source code
- Test plans, test cases and test results covering all use cases

PTC will analyze the documentation and source code for security and performance issues. PTC can refuse any Customization that is considered a risk in terms of performance, maintainability and sustainability of the solution, operation or security.

### Termination of Service

Once the Service End Date is known, the Customizations will be removed from the Hosted Service by following PTC’s standard Change Control process.

If ECS Termination is associated with a related Service termination, Customer will follow the termination process for that related Service.



## Federal and Defense Offerings

### Introduction

The PTC Cloud Federal and Defense offering is for those Customers who require their solution to adhere to US Federal requirements for ITAR, ITIL, DFARS, CMMC, FedRAMP or IL2/IL4/IL5 certified service. This offering is sold in some cases as an add-on to an underlying offering (e.g., Windchill PLM SaaS). Whether sold as an add-on or as a complete offering, the standard terms of the underlying offering apply in addition to those stated here. Where discrepancies exist, the terms in this Federal and Defense offering description will supersede. The availability of specific software product versions may vary from PTC's general software support version matrix.

### Solution Scope:

The Federal and Defense offering is available as a standard service package.

- Solutions hosted as part of this service are managed in accordance with the required regulations and all required upgrades and modifications will be applied as needed to maintain certified status. Depending on the nature of any changes, Customer may be required to participate in testing, adjusting and accepting these changes on a planned maintenance schedule set by PTC. Such changes may include an upgrade of PTC software in order to maintain overall solution compliance and third-party compatibility.

### The following items are included in the standard offering for FedRAMP / IL2:

- PTC provided certification for FedRAMP where PTC will maintain an active FedRAMP authorization per regulations listed herein:
  - Cybersecurity Maturity Model Certification (CMMC)
  - DFARS 252.204-7008: Compliance with safeguarding covered defense information controls
  - DFARS 252.204-7012: Safeguarding covered defense information and cyber incident reporting
  - DoD Cloud Computing Security Requirements Guide V1 R 3
  - FAR 52.204-21: Basic Safeguarding of Covered Contractor Information Systems
  - Federal Information Security Management Act (FISMA)
  - Federal Risk and Authorization Management Program (FedRAMP)
  - NIST SP 800-171: Protecting Controlled Unclassified Information in Nonfederal Information Systems and Organizations
  - NIST 800-53 r4: Security and Privacy Controls for Federal Information Systems and Organization

### The following items are included in the standard offering for IL4 / IL5:

- For DoD Cloud customer environments, PTC will maintain an active Defense Information System Agency (DISA) authorization at the level appropriate to the requirement, to provide the relevant cloud computing services in accordance with the DISA Cloud Computing Security Requirements Guide (SRG) version in effect at the time and comply with the regulations listed herein:
  - DFARS 239.76: Cloud Computing
  - DODI 8510.01: Risk Management Framework (RMF) for DoD Information Technology
  - DoD Cloud Computing Security Requirements Guide V1 R 3
  - DoD Security Technical Implementation Guides (STIGs). In delivery of the service, PTC Cloud will comply with the following access restrictions:
    - Access to Controlled Unclassified Information (CUI) must be limited to U.S. Persons that have (1) a current U.S. security clearance (minimum interim SECRET clearance), or (2) have been the subject of a favorably completed National Agency Check with Inquiries (NACI), or (3) have been the subject of a favorably completed background check pursuant to a background check program submitted to Customer and approved by the Government.
    - Personnel with dual citizenship that have an active U.S. security clearance (interim Secret or higher) may be permitted access to Controlled Unclassified Information (CUI). Personnel with dual citizenship that do not have an active U.S. security clearance (interim Secret or higher) are not authorized access to CUI unless a request is submitted to Customer and approved in writing by Customer.

### Offering Basis

The following terms describe PTC's commitment and governing practices for the Federal and Defense offering.

- PTC's Cloud Services business unit ("PTC Cloud Services") is a SaaS CSP and is FedRAMP Authorized at the Moderate Baseline. See FedRAMP.gov for more details about this.
- PTC Cloud Services meets all NIST 800-171 security control requirements required by DFAR 252.204-7012 and CMMC.
- PTC Cloud Services is audited annually by a FedRAMP and DoD approved third party assessment organization (3PAO) to ensure compliance with the FedRAMP Moderate Baseline and with the DISA SRG version in effect at the time.
- PTC Cloud Services will comply with the requirements of DFARS 252.204-7012(c)-(g) for cyber incident reporting, malicious software, media preservation and protection, access to additional information and equipment necessary for forensic analysis, and cyber incident damage assessment.



- PTC Cloud Services will ensure that all data hosted in the PTC FedRAMP and DoD Clouds remains in the United States, districts, territories, and outlying areas of the United States, and hence ensuring that the data remain under U.S. jurisdiction at all times.
- All PTC employees or authorized third parties in roles with access to DoD CUI categorized as critical sensitive will be U.S. Citizens and subject to a satisfactory Single Scope Background Investigation or other background investigation for high risk.
- All PTC employees or authorized third parties in roles with access to DoD CUI categorized as moderate risk positions or non-critical designations will be U.S. Citizens and subject to a National Agency Check with Law and Credit or equivalent.

The items below are responsibilities of the Customer:

- Customer is responsible for ensuring that only authorized personnel with current U.S. government security clearances or other authorizations, as required, are granted access to these Hosted Systems.
- Customer is responsible for ensuring that any data held in these systems is appropriate given the nature of the Hosted System, and PTC is not responsible for determining the appropriate access policies for Customer personnel or data. For example, without limitation, PTC’s Hosted Systems are not suitable for classified information or documents, and it is Customer’s responsibility to ensure that such information/documents are not included in the Hosted Systems.

**Allowable Configurations**

In addition to the allowable configuration terms defined for the relevant solution specific offering, the following applies for the Federal and Defense offerings:

Category	Capability
Configurations and actions not permitted for PLM	Customers may not be granted server level access to application environments for any reason.
	Integrations to third party applications that are not contained in a FedRAMP certified environment are not allowed.
	Customers are responsible to document and provide PTC with a validated code package that can be used to apply customizations and integrations on the secured production environment.
	<p>The following add-on options available in the standard commercial offer are not permitted for Customers purchasing this Federal and Defense Add On Service.</p> <ul style="list-style-type: none"> <li>• Additional PTC hosted locations for Remote File Vaults (Replicas)</li> <li>• Additional services for sFTP Server or similar external file management.</li> <li>• Third party software extensions for CATIA WGM and Autodesk Inventor WGM</li> <li>• COGNOS for reporting</li> <li>• ECAD integrations &amp; publishing</li> <li>• WinCOM extension for Windchill</li> <li>• CREO/Windchill AR Designshare</li> </ul>



## Windchill PLM SaaS

### Introduction

This offering provides Customers with a PTC Windchill environment that is hosted and managed by PTC. It includes a comprehensive set of PLM capabilities described below and supports some levels of customization and integration with external on-premise and cloud systems such as ERP and CRM.

### Solution Scope

Windchill PLM SaaS is available as a standard service package with optional services that can be purchased separately. Windchill PLM SaaS Standard Services include:

- Windchill Enterprise Packages (Base, Advanced, Premium):
- Windchill Role Based Add-ons can be purchased in addition to an enterprise package.
- Extended PLM Add-ons can be purchased in addition to an enterprise package.
- A single dedicated production instance and a single non-production instance
- CAD publishing capacity for up to 100 Authors of Creo on the production instance and up to 50 Creo Test Authors on the non-production instance. Additional CAD publishing capacity can be purchased.
- Storage allocation of 1024 GB (1 TB) shared across all purchased PLM environments.
- A total of 12 Named Service Requests per calendar year across all purchased environments.
- Service Management engagement as described in the Service and Support Terms and Conditions

### Offering Basis

- Windchill PLM SaaS is contracted on a “Monthly Active User” basis.
- There are defined types of Registered User profiles that may be purchased: **Windchill Base, Advanced or Premium**. Each profile grants the assigned user access only to the functionality entitled by that profile. Customers are required to allocate users to license profiles within the Windchill production environment. Failure to appoint users to appropriate license profiles may result in overage fees. Users may not be retroactively changed from one license profile to another.
- In some cases, it may be necessary for PTC to install and run certain Windchill compatible third-party software so the Hosted Software can process Hosted Data (e.g. data from certain non-Creo CAD systems, PTC Partner created applications, and/or document format translators). In such cases, for PTC to install and run such third-party software for Customer, it must be specifically agreed in the Quote and the Customer will be required to secure licenses and authorization for PTC to host such third-party software.
- PTC is not obligated to host for Customer any customization or custom applications unless specifically agreed in the Quote that PTC will host the same as ECS.
- A “Third-party Integration” is a custom-developed integration that communicates with the Hosted Software. PTC is not responsible for connectivity issues or downtime related to or caused by the integration of any non-PTC applications.
- Windchill reporting capabilities requiring the use of Cognos (including Windchill software out of the box reports) are not included in the standard PLM SaaS offering.

### Allowable Configurations

Category	Capability
Supported Configurations	Choose custom version schemes
	Define custom attributes (only for system supported types)
	Define saved searches
	Define groups, roles and teams with custom access rules
	Define object initialization rules
	Configure lifecycle schemes
	Define Windchill Object subtypes using supported Windchill Type definitions
	Publishing rules must follow the out of the box “PublishRulesSchema.xsd” schema and will be accepted based on review and approval by PTC. Additional information about Publish Rules can be found in the Windchill Help Center.
Customizations and integrations are subject to review and acceptance by PTC. Customizations or integrations that create or edit Windchill objects may be rejected if PTC determines such customizations might compromise data integrity and/or security.	
Configurations and actions not permitted	Site administration access in a Production Hosted System is not available directly for Customers
	Full Windchill Organization administration access in production system is not available. Specific limitations are implemented in the production environment against WC ORG Admin.
	Direct application of configurations and customizations to production system is not allowed. Changes to Production are required to follow standard Change Management quality control practices and require documented Build



	Packages to be submitted to PTC.
	CAD or other Publication servers (Workers) not located in the PTC Cloud hosted infrastructure are not supported.
	Batch printing using Print worker configuration to a Customer hosted print server is not supported unless specifically agreed via an approved integration. There are not SLAs for such an arrangement.
Customizations, Integrations and offering extensions <i>(additional fees apply)</i>	Separate fees are required for allowing customizations beyond Supported Configurations in a production environment. PTC does not develop or maintain customizations or integrations on behalf of Customer unless purchased separately. See above terms for ECS (Extended Cloud Services) for more information.
	Customers are responsible to document and provide PTC with a validated code package that can be used to apply customizations and integrations on the secured production environment.
	<p>The following add-on options are applicable to Windchill PLM SaaS:</p> <ul style="list-style-type: none"> <li>• Additional Publishing Capacity for publishing CAD (sold for Creo and third party)</li> <li>• Additional PTC hosted locations for Remote File Vaults (Replicas)</li> <li>• Additional Application environments to support use cases such as data migration or quality assurance</li> <li>• Additional services for Infrastructure and Networking such as managed VPN connections, Encryption at Rest, sFTP Server, Vault storage capacity and IP Whitelisting.</li> <li>• Management of existing application customizations and integrations (subject to restrictions described above). Does not include bug fixes or enhancements unless specified.</li> <li>• One-time Setup Fees for applicable solution extensions.</li> </ul>

### Data Storage Entitlements

Customers are entitled to the standard data storage as described above in the Solution Scope. In addition, Customer can purchase incremental multiples of One Terabyte of storage as required. The total amount of storage a Customer is entitled to is shared across all PLM SaaS and Managed Services environments (production and non-production) that have active PTC subscriptions and allocated by PTC to support the Customer’s usage requirements.

### Data Export Formats

For authorized Windchill data exports, the data export formats will include applicable items from the following: Database schema export, Directory LDIF export or similar user list export, Enterprise LDAP LDIF export, external file vault(s) contents.





## ThingWorx Navigate

### Introduction

The ThingWorx Navigate offering delivers a solution dedicated to the Customer, includes connectivity to a PTC Cloud Services PLM solution (purchased as SaaS or Managed Services) and, with additional fees, supports integration with external on-premise and cloud systems such as ERP and CRM.

### Solution Scope

Navigate SaaS is available as a standard service package with optional services that can be purchased separately. The solution includes software entitlement choices, a bundle of standard cloud service entitlements, and add-on cloud services to meet Customer specific requirements. It is sold as an expansion to a PTC Cloud Windchill PLM SaaS or Windchill PLM Managed service. ThingWorx Navigate standard entitlement includes:

- Navigate Packages: Customers may purchase users, registered as either View or Contribute, or Active Daily User licenses
- A single dedicated production instance and a single non-production instance
- Integration between a single ThingWorx Navigate and a single PTC Cloud managed Windchill instance for each included environment
- Storage allocation of 500 GB shared across all purchased environments
- A total of 6 Named Service Requests per year across all environments (option to purchase additional)
- Service Management engagement as described in the Service and Support terms and offered at the same level as entitled for PLM SaaS

### Offering Basis

- Navigate SaaS 1.0 is contracted on the basis of Monthly Active Users or Active Daily Users.
- There are four types of Registered User profiles that may be assigned: **Contribute, View, Connected PLM View, Connected PLM [Contribute]**. Each User type grants the assigned user access only to the functionality entitled by that profile. The Contribute profile includes access to the View capabilities. Customers are required to create users within the ThingWorx Navigate production environment. Failure to adequately actively manage the creation and assignment of users may result in unexpected consumption records and associated overage fees. PTC Cloud is not responsible for incorrectly managed users in the system.
- ThingWorx Navigate apps may only connect to other software systems. Apps that connect to physical devices are not allowed as part of this Service.
- ThingWorx Navigate does not include Microsoft Azure Iot Hub as part of this Service.
- Connections to additional systems beyond those included as standard inclusion (specified above) are not included unless purchased separately and defined in the Quote.
- Active Daily User licenses are not allowed overages. Consumption will be limited to the contracted number of users only.
- Setup and implementation of Single-sign-On (SSO) services are not included unless specifically purchased via an available PTC offering or otherwise agreed in writing.

### Data Export

Depending on the offerings purchased, data export will include applicable items from the following: Database schema export, Directory LDIF export or similar user list export, Enterprise LDAP LDIF export, external file vault(s) contents.



## PTC Windchill Product Quality SaaS

### Introduction

Windchill Product Quality (WPQ) Cloud is a SaaS offering for bringing medical products to market using Windchill PLM. A Validation Accelerator Package (VAP) is included and covers the use of standard WPQ processes. This offering can be combined with other offerings but in doing so, a separate agreement will need to be established to cover additional Validation scope. Standard terms of the Windchill PLM SaaS offering apply in addition to those stated here. Where discrepancies exist, the terms in this WPQ SaaS offering description will supersede.

### Solution Scope:

Windchill Product Quality SaaS is available as a standard service package with optional services that can be purchased separately. The following items are included in the standard offering:

- WPQ Preconfigured processes for Design Control, Document Control, CAPA/SCAR, Non-conformance Management, Complaint Management
- Validation Accelerator Package prepared for the WPQ preconfigured processes
- PTC-provided evidence in support of Installation Qualification (IQ) covering the scope of this standard offering only.
- Included Windchill PLM SaaS features:
  - Core PDM (e.g. versions, workflows, content management & access control)
  - Visualization (3D, 2D)
  - Project Planning/Execution
  - Document Management
  - Business systems Integration
  - Change Management
  - BOM Management
  - Creo View Adapter for PDF
- A single dedicated production instance and a single non-production instance
- CAD publishing capacity for up to 100 Authors of Creo on the production instance and up to 50 Creo Test Authors on the non-production instance. Additional CAD publishing capacity can be purchased.
- A total of 12 Named Service Requests per calendar year across all purchased environments.
- Service Management engagement as described in the Support Terms and Conditions

### Offering Basis:

- WPQ Cloud is licensed based on a Monthly Active User basis. A commitment of a minimum of thirty Author users is required for this offering.
- There are two types of Licenses: Authors and Contributors. A Contributor user may not be logged into the Hosted System for more than forty hours per month and is subject to limitations in the Hosted System on functionality that they can access.
- Third-party CAD publishing must be quoted separately for each additional CAD tool requiring automated publishing of viewables. Customer is required to secure licensing for third party CAD tools to support the CAD publishing functions.
- In addition to the specific Medical Device pre-configured processes, the offer includes standard PLM capabilities such as document management, change management and workflow management. These capabilities can be used to enable the WPQ system but the Customer must plan to configure and validate these capabilities, as this is not included in the offering.
- The WQM Cloud offering supports additional configuration, customization, and integration capabilities that are available in Windchill and described in the Windchill PLM SaaS offering. In case of customizations and integrations, the Customer will be required to pay to PTC additional Extended Cloud Service (ECS) fees for run-time support, maintenance and upgrade of such customizations and integrations. Any change to the WQM software's intended use is likely to require additional validation effort and may incur additional validation fees that will be payable to USDM.

### Data Storage Entitlements:

Each Author user is entitled to use up to 30 GB of storage. Additional storage can be purchased.



## Windchill FlexPLM SaaS and Other Retail Offerings

### Introduction

This offering provides Customers with a PTC Windchill FlexPLM environment that is hosted and managed by PTC. It delivers a solution dedicated to the Customer, includes the set of capabilities described below, and supports some levels of customization and integration with external systems such as ERP and CRM.

Standard terms of the Windchill PLM SaaS offer apply in addition to those stated here. Where differences exist, the terms in this Windchill FlexPLM SaaS offering description will supersede.

### Solution Scope

- Windchill FlexPLM SaaS Standard entitlement includes:
- Windchill FlexPLM enterprise packages (Registered User or External User)
- A single dedicated production instance and a single non-production instance
- Storage allocation of 1024 GB (1 TB) shared across all purchased PLM environments
- A total of 12 Named Service Requests per calendar year across all purchased environments
- Standard Service Management engagement as described in the PTC Support Terms and Conditions

### Offering Basis

- Windchill FlexPLM SaaS is contracted on a Monthly Active User basis.
- There are defined types of profiles that may be purchased: Windchill FlexPLM Registered User, Windchill FlexPLM External User. Each profile grants the assigned user access only to the functionality entitled by that profile. Customers are required to allocate or confirm Authorized Users to license profiles within the Windchill FlexPLM production environment. Failure to appoint users to appropriate license profiles may result in overage fees. Users may not be retroactively changed from one license profile to another.
- The FlexPLM “External Capacity User” (also known as “Supplier”) may be assigned only to users who are vendors, third parties and others external to the Customer and its affiliates (“External Users”). External User licenses may be reassigned to another External User at no additional license fee, except that an External User license may not be used by more than one External User during any calendar month.
- Windchill FlexPLM Registered Users and External Users also receive entitlements to use certain role-based applications (the FlexPLM TechPack Access App). These applications may only be used for the following purposes:
  - to execute applications to view, print, create, and/or update information from solutions sold by PTC and delivered through the components bundled with the role-based applications.
  - to leverage the included ThingWorx application only for the sole purposes of accessing FlexPLM data as applicable to the role-based applications and configuring details required for the role-based applications.

This offering also requires the purchase of additional optional items to enable these role-based apps in Customer’s environment(s). Refer to specific sections in this document regarding specific terms associated with the specific app.

- In some cases, it may be necessary for PTC to install and run certain Windchill compatible third-party software so the Hosted Software can process hosted third party data. In such cases, for PTC to install and run such third-party software for Customer, it must be specifically agreed in the Quote and the Customer will be required to secure licenses and authorization for PTC Cloud to host such third-party software.
- PTC is not obligated to host for Customer any customization or custom applications unless specifically agreed in the Quote. Additional fees may apply.
- A “Third-party Integration” is a custom developed integration that communicates with a PTC application. PTC is not responsible for connectivity issues or downtime related to the integration of any non-PTC Hosted applications.
- Windchill reporting capabilities requiring the use of Cognos (including Windchill out of the box reports) are not included in the standard Windchill FlexPLM SaaS offering. Customers intending to use this capability will be required to separately purchase such reporting functionality.

### Allowable Configurations

In addition to the allowable configuration terms defined for Windchill PLM SaaS, the following applies for Windchill FlexPLM SaaS:

Category	Capability
Customizations, Integrations and offering extensions	Separate fees are required for allowing customizations beyond Supported Configurations in a production environment. PTC does not develop or maintain customizations or integrations on behalf of Customer unless purchased separately. See below terms for ECS (Extended Cloud Services) for more information.

<p><i>(additional fees apply)</i></p>	<p>Customers are responsible to document and provide PTC with a validated code package that can be used to apply customizations and integrations on the secured production environment.</p>
	<p>The following add-on options are applicable to Windchill FlexPLM SaaS.</p> <ul style="list-style-type: none"> <li>• Adobe Illustrator integration and publishing capability</li> <li>• Additional PTC hosted locations for Remote File Vaults (Replicas)</li> <li>• Additional Application environments to support use cases such as data migration or quality assurance</li> <li>• Additional services for Infrastructure and Networking such as managed VPN connections, Encryption at Rest, sFTP Server, Vault storage capacity and IP Whitelisting.</li> <li>• Create and manage 3D CAD documents and engineering parts and product structures using Browzwear 3D extension</li> <li>• TRC and Canvas Apps and their relevant add-ons</li> <li>• Management of existing application customizations and integrations (subject to restrictions described above). Does not include bug fixes or enhancements unless specified.</li> </ul>

## Data & Devices

### Data Storage Entitlements

Customers are entitled to the standard data storage as described in the Solution Scope. In addition, Customer can purchase incremental multiples of One Terabyte of storage as required. The total amount of storage a Customer is entitled is shared across all FlexPLM SaaS and Managed Services environments that have active PTC subscriptions and allocated by PTC to support the Customer’s usage requirements. Smaller volumes are assigned to non-production systems under the assumption these are not expected to support complete data sets or user-base constituents.

## Retail IoT ADK

### Introduction

This offering provides Customers with a Retail IoT ADK environment that is hosted and managed by PTC. It delivers a solution dedicated to the Customer, includes connectivity to a PTC Cloud Services Retail PLM service (SaaS or Managed).

### Solution Scope

Retail IoT ADK SaaS is available as an expansion to a PTC Cloud FlexPLM SaaS or Managed service. Retail IoT ADK SaaS Standard entitlement includes:

- Entitlement to Retail IoT ADK Base solution
- A single dedicated production instance and a single non-production instance
- Integration between a single Retail IoT ADK and a single PTC Cloud managed FlexPLM for each included environment.

### Offering Basis

- Retail IOT ADK is contracted on a “Monthly Active User” basis.
- Every Retail IOT ADK User will also require a Windchill FlexPLM User license (either External SaaS or Registered User)
- It can be used to only connect to PTC’s FlexPLM product and other enterprise systems (e.g., Oracle ERP, SAP, CRM systems, etc.). It may not be used to access data from devices – which can include but is not limited to connected products, wearables, production machinery, and physical assets – and any edge servers or services that devices are connected to.
- It also may not be used to connect to manufacturing systems, processes, and/or operations belonging to the Customer’s internal production facilities or the Customer’s suppliers’ production facilities.

## FlexPLM – Adobe Illustrator Plug In

### Introduction

This offering provides Customers with a connection from their Adobe Illustrator applications via a locally loaded Adobe Plugin to a FlexPLM system which is hosted and managed by PTC. Data created in the Adobe applications can then be stored in the FlexPLM system.

### Solution Scope

The Adobe Illustrator (AI) Adapter is available as an add-on package to FlexPLM SaaS that includes:

- The Adobe Illustrator Adapter
- A single AI Server Adapter on the production instance of a FlexPLM system which is hosted and managed by PTC and subject to agreed SLAs and SLTs as describe in the PTC Support Terms and Conditions.



- An AI Server Adapter on each additional non-Production instance of a FlexPLM system which is hosted and managed by PTC for the Customer.

#### Offering Basis

- The AI plug-in is sold as each and only as an add-on to existing FlexPLM SaaS or Managed environments.
- There is a per user license required for each Windchill FlexPLM user that requires the integration
- Customers are required to deploy and maintain (including upgrades) the AI Plugin within their user environment. Adobe software which is compatible with the AI Server Adapter is required.
- PTC Cloud will perform quarterly audits of Customer usage and Customer will be required to purchase additional user licenses based on actual consumption.

### **FlexPLM - Browzwear 3D Server Adapter**

#### Introduction

This offering provides Customers with a connection from their Browzwear applications via a locally loaded Browzwear 3D Plugin to a FlexPLM system which is hosted and managed by PTC. Data created in the Browzwear applications can then be stored in the FlexPLM system.

#### Solution Scope

The Browzwear 3D Server Adapter is available as an add-on package to FlexPLM SaaS that includes:

- The Browzwear 3D Server Adapter
- A single Browzwear 3D Server Adapter on the production instance of a FlexPLM system which is hosted and managed by PTC and subject to agreed SLAs and SLTs as describe in the PTC Support Terms and Conditions.
- A Browzwear 3D Server Adapter on each additional non-Production instance of a FlexPLM system which is hosted and managed by PTC for the Customer.
- One additional Terabyte of data storage entitlement on the production instance of a FlexPLM system which is hosted and managed by PTC.

#### Offering Basis

- The Browzwear 3D Plugin is sold as each and only as an add-on to existing FlexPLM SaaS or Managed environments.
- There is a per user license required for each Windchill FlexPLM user that requires the integration
- Customers are required to deploy and maintain (including upgrades) the Browzwear 3D Plugin within their user environment. Browzwear software which is compatible with the Browzwear 3D Server Adapter & 3D Plugin is required.
- PTC Cloud will perform quarterly audits of Customer usage and Customer will be required to purchase additional user licenses based on actual consumption.

### **ThingWorx Retail Connector (TRC)**

#### Introduction

This offering provides Customers with a ThingWorx Retail Connector environment that is hosted and managed by PTC. It delivers a solution dedicated to the Customer, includes connectivity to a PTC Cloud Services Retail PLM service (SaaS or Managed) and supports integration with external on-premise and cloud systems such as ERP and CRM.

#### Solution Scope

TRC SaaS is available as a standard service package with required and optional services that can be purchased separately: The solution includes software entitlement choices, a bundle of standard cloud service entitlements, and add-on cloud services to meet Customer specific requirements. It is sold as an expansion to a PTC Cloud FlexPLM SaaS or Managed service.

TRC SaaS Standard entitlement includes:

- Entitlement to TRC Base solution
- A single dedicated production instance and a single non-production instance
- Integration between a single TRC and a single PTC Cloud managed FlexPLM for each included environment.
- High Speed storage allocation of 250 GB shared across any purchased environments
- Service Management engagement as described in the Service and Support terms and offered at the same level as entitled for PTC Cloud PLM



- The ThingWorx Retail Connector (SAS-2253-F) provides integration of FlexPLM to one (and only one) system of non-PTC software. No other use of ThingWorx is permitted. To connect to additional non-PTC systems, Customers will need to license the TRC Additional System Connection (SAS-2254-F) for each additional non-PTC system. There is no limit to the number of SAS-2254-F licenses that can be acquired once SAS-2253-F is licensed.

#### Offering Basis

- TRC SaaS is contracted on a yearly basis unless otherwise noted.
- There are two subscriptions required – a Base and a per-connection fee covering the PTC responsibilities for connections between TRC and third-party solutions or services.
- TRC does not support the use of Single Sign On (SSO) experience

#### Solution Service Model

##### Customer responsibility:

Customers are required to adhere to PTC Cloud security policies and solution usage guidelines when defining TRC custom Apps.

## PTC Canvas SaaS

#### Introduction

The PTC Canvas SaaS offering is available in three different service packages:

- **PTC Canvas – Core Capabilities:** This offering provides access to PTC’s Canvas application. Canvas is a concept management and collaboration offering that allows retailers and brand owners to capture ideas, trends, and other product development information and share those ideas with internal and external users.
- **PTC Canvas – Trend Packs:** This offering provides access to trending imagery from social media platforms. The imagery is provided within Canvas and can be tailored to a retailer or brand owner’s specific needs.
- **PTC Canvas – Advanced PLM Integration:** This offering provides the ability for Customers using Canvas to retrieve data from a connected FlexPLM environment and create data in FlexPLM using Canvas as the means to capture that data initially.

#### Offering Basis

- All PTC Canvas service packages specified above are sold on the basis of Monthly Active Users.
- Customers must purchase PTC Canvas Core Capabilities before adding other options
- Included storage for each PTC Canvas Core Capabilities service package is 2 GB of storage per user
- PTC Canvas – Trend Packs are packs of four Trend Streams. Trend Streams are streams that are customized to show imagery based on a category or topic defined by the Customer. For example, a Customer may want to see trending imagery for sports-related performance outerwear.
  - Customer must pay the per Trend Pack fee for each user leveraging any of the tailored Trend Streams within a Trend Pack in the applicable month. A single user accessing all 4 Trend Streams will be counted as 4 Trend Pack users.
  - PTC will work with a Customer to establish a tailored Trend Stream and then refine that Trend Stream over a three-month period. During this period, the Customer can provide feedback to PTC that enables PTC to adjust the image search mechanism so it can provide more relevant images. No adjustments to the tailored Trend Streams will be made after the end of the three-month period.
  - If Customer desires additional or different Trend Streams, additional Trend Packs would need to be purchased.
- PTC Canvas – Advanced PLM Integration users are sold on a per user basis and counted based on Monthly Active Users. Each customer must configure their Canvas settings to specify their FlexPLM environment details. Customers requiring assistance can work with their Cloud service managers for help via a service request.



## Servigistics SPM SaaS Service

### Introduction

The SPM SaaS offering applies solely to PTC Servigistics SPM products as specified below and not to any other PTC product or service.

SPM SaaS is offered as six packages that address three market segments, as specified below. A Customer is required to license only one package as the functionality is cumulative (e.g., Advanced includes all Foundation features plus more).

### Solution Scope

SPM SaaS Standard Services include:

- Up to 50 concurrent users
- A single dedicated production instance and a single non-production instance
- Storage allocation as specified below
- A total of 12 Named Service Requests per calendar year across all purchased environments.
- Standard Service Management as specified in the Support Terms and Conditions document

### Offering Basis

A brief description of each package is provided below.

- **Servigistics SaaS SPM Commercial Foundation** – Base SPM package for non-Federal, Aerospace and Defense (FA&D) Customers including high tech, medical, auto, heavy equipment, etc.
- **Servigistics SaaS SPM Commercial Advanced** – Advanced package for non-FA&D Customers including high tech, medical, auto, heavy equipment, etc.
- **Servigistics SaaS SPM Commercial Aviation Foundation** – Base SPM package for commercial aviation Customers
- **Servigistics SaaS SPM Defense Foundation** – Base SPM package for defense Customers including government and other PBL based businesses
- **Servigistics SaaS SPM FA&D Advanced** – Advanced package for all FA&D Customers (commercial airlines and defense)
- **Servigistics SaaS SPM Premium** - Premium SPM Package for Customers in all industries.

The SPM Solution is delivered as Software as a Service, each package provides specific product feature sets as specified below.

- **Servigistics SaaS SPM Commercial Foundation –**
  - Forecasting
  - Optimization (MEO)
  - Order Planning
  - Last time Buy (LTB)
  - Insight Dashboards
  - Global Part Chains
- **Servigistics SaaS SPM Commercial Advanced**
  - Everything included in the SaaS SPM Commercial Advanced Foundation PLUS:
    - Advanced Forecasting
    - Advanced MEO
    - Advanced Order Planning
    - Cluster Based LTB
    - Local Part Chains
    - Network Optimization
    - Service Parts Pricing
    - Connected SPM\*
- **Servigistics SaaS SPM Commercial Aviation Foundation –**
  - Forecasting (including Special Events)
  - Optimization (MEO)
  - Order Planning



- Last Time Buy (LTB)
- Insight Dashboards
- Global Part Chains
- **Servigistics SaaS SPM Defense Foundation**
  - Forecasting (including Special Events)
  - Optimization (MEO and ASO)
  - Order Planning
  - Insight Dashboards
  - Global Part Chains
- **Servigistics SaaS SPM FA&D Advanced**
  - Everything included in the SaaS SPM Commercial Aviation Foundation PLUS:
    - Advanced Forecasting
    - Advanced MEO and ASO
    - Advanced Order Planning
    - Cluster Based LTB
    - Local Part Chains
    - Network Optimization
    - Connected SPM\*
- **Servigistics SaaS SPM Premium**
  - Everything included in the SaaS SPM Commercial Advanced PLUS:
    - ASO
    - K-Curve

\*Offering Specific Terms for Connected SPM are listed below in Connected SPM for SPM SaaS Offerings section

## Licensing Profiles and Allowable Configurations

### License Profile

SPM SaaS is licensed based on one of two variables, PMI or PXL.

For the PMI-based offering, in such case the license is limited by the value of inventory that is included in the software (using the values assigned by the Customer as specified in the software and consistent with the values of such inventory as stated in the company's audited financial systems) as of the date the software is first implemented for or by Customer (the "Baseline Value"). It is sold in blocks of US\$1 million (or such other currency as may be specified in the Quote), with each quantity unit ordered representing US\$1 million of Customer inventory. Additional restrictions (e.g., geographic, divisional, etc.) may be specified in the order documents. Customer will be required from time to time upon request to inform PTC of the value of the inventory included in the software. All parts, at all locations (parts times locations) input to the SPM system is considered inventory (e.g., forecasted, optimized, supply/demand planned, repaired, balanced, etc) regardless of the condition of the inventory (e.g., on hand new, on hand fixed, on hand bad, on order, in return, in repair). If the value of the inventory managed in the software drops below the Baseline Value, Customer shall nonetheless be required to license at least the Baseline Value. If the value of the inventory managed increases above the Baseline Value, Customer shall be required to license the excess amount. In the event Customer acquires other businesses and desires to manage the inventory of such other businesses using the software, Customer shall notify PTC of such fact and the parties shall negotiate in good faith an increase to the Baseline Value (and corresponding fees).

For the PXL-based offering, the calculation of the number of PXLs required shall be determined by multiplying the number of part numbers in the software times the number of locations in the software as of the date the software is first implemented for or by Customer (the "Baseline Value"). For example, without limiting the foregoing, if Customer includes in the software 10,000 part numbers and 4 locations, Customer will be managing 40,000 "PXLs" and would need to purchase a quantity of at least 40,000 PXLs. If the number of PXLs in the software drops below the Baseline Value, Customer shall nonetheless be required to license at least the Baseline Value. If the number of PXLs in the software increases above the Baseline Value, Customer shall be required to license the excess amount. In the event Customer acquires other businesses and desires to manage the inventory of such other businesses using the software, Customer shall notify PTC of such fact and the parties shall negotiate in good faith an increase to the Baseline Value (and corresponding fees).

There is a third variable that is not directly used to price the offering but can act as a constraint/limit to the pricing. This variable is Part/Location pairs (PLP).

"PLP" is defined the quantity of Part/Location Pairs (part at a location) planned in the system. Each part has the potential to be planned at one or more locations in the network/hierarchy. In SPM forecasting and planning are done for each part at each location where it has been used in the past (demand) or is anticipated to be used in the future (forecast). The total number of PLPs is a factor in system processing and environment sizing.





Configurations

The SPM SaaS offering supports additional configuration, customization, and integration capabilities. In case of customizations and integrations, the Customer will be required to pay to PTC additional Extended Cloud Service (ECS) fees for run-time support, maintenance and upgrade of such customizations and integrations.

**Data & Devices**

Data Storage Entitlements

For PMI based pricing, regardless of package purchased, there is a limit to the number of PLPs that can be managed in the system based on the inventory tier. There is also a storage allocation for each of the PMI tiers. Details below:

Storage is defined as the amount of data stored in the database for the SPM solution

	PMI (USD)				
	24-49	50 – 99	101 – 199	201-499	500+
PLPs	Up to 1,000,000	1,000,001 – 3,000,000	3,000,001 – 9,000,000	9,000,001 – 16,000,000	16,000,000+
Storage	350GB	700GB	1,000GB	1,750GB	3,000GB

**Data Export**

Data Export: The data export for this offering includes the information required to redeploy the software in another environment. Depending on the solution purchased, this may include: Database schema export, Directory LDIF export or similar user list export, Enterprise LDAP LDIF export contents.

**Service and Parts Information SaaS Offering**

The PTC Service & Parts Information SaaS offering is an integrated approach to providing PTC’s world class Service & Parts Information solution in a software as a service (SaaS) model.

The offering is currently available only for the PTC Servigistics InService product (InService). The InService SaaS offering is focused on service and parts content delivery using the InService application. The offering is based on a pre-defined configuration. Customers can load service and parts information content from existing authoring/content management systems to InService using standard product loaders and deliver the information to the service network in a consolidated manner.

The offering includes a remote training/mentoring session with a PTC subject matter expert to help train the Customer administrator(s) on system administration, how to prepare the service information for loading and personalize the application for the company specific branding. This training/mentoring session supports the loading of 1 product, up to 500 service documents, and up to 5,000 individual part entries. Additional support or integrations with other systems can be contracted upon mutual agreement.

The InService SaaS offering is currently hosted in the following regions. The hosting location in case of global user distribution will be the closest supported AWS region where the most number of users are located. Pricing is based in part on the hosting location, and so if Customer would like to elect a different hosting location than what was originally quoted, additional fees may be required.

- North America – East (Virginia), West (Oregon)
- Dublin, Ireland
- Frankfurt, Germany
- Tokyo, Japan
- Singapore
- Sydney, Australia

The InService SaaS foundation includes hosting of one high availability clustered deployment for production InService environment and a scaled down split deployment sandbox environment for training, testing, development and other non-production purposes.

The licensing model of this offering is based on an initial foundation purchase that includes the number of Registered Users specified in the Quote. Additional Registered Users may be purchased, either on a committed basis or as overage.

In addition, Customer may purchase Login Events for Public Users, both of which are defined below.

Also, the InService SaaS foundation includes an allocation of data storage as specified in the Quote. Additional data storage may be purchased either on a committed basis or as overage.

There are also limits in the offering on data transfer rates for data being downloaded from the offering. The standard offering allows for 3 TB of data transfer per month. Additional data transfer capacity may be purchased either on a committed basis or as overage.



Overage for Registered Users is measured on a monthly basis. Overage for Login Events is measured on an annual basis.

Registered User – The offering is licensed on a Registered User basis.

Public User – A user of the InService SaaS offering who is not a direct member of Customer’s service network. Service network includes but is not limited to Customer’s direct service technicians, authorized dealers and service providers.

Login Event – A login event is an act by a Public User of authenticating with the user credentials to get access to the InService SaaS offering.

Data Export: Depending on the solution purchased, data export may include: Database schema export, Directory LDIF export or similar user list export, Enterprise LDAP LDIF export, data directory contents.



## ThingWorx SCP SaaS Platform Service

### Introduction

This offering grants to Customer for the Term of Customer's subscription to the ThingWorx SCP SaaS Platform Service, a non-exclusive, nontransferable limited right and license to access and use ThingWorx SCP SaaS Platform Service for connecting Customer's products and for building and running IoT applications. The ThingWorx SCP SaaS Platform Service may not be used for remote management of Customer's operations.

### Solution Scope

ThingWorx SCP SaaS Platform is available as a standard service package with optional services that can be purchased separately.

All ThingWorx SCP SaaS Services include:

- ThingWorx SCP SaaS Editions (Premium, Professional, Enterprise) or Machine Builder Bundle
- Registered Users and Assets as specified in each edition
- Connectivity to Kepware or any other supported Edge Agent technology
- Connectivity to Microsoft Azure IoT Hub
- A single dedicated production instance and a single non-production instance
- Storage allocation as specified per environment.
- A total of 12 Named Service Requests per calendar year across all purchased environments.
- Service Management engagement as described in the Service and Support Terms and Conditions

### Offering Basis

There are different ThingWorx SCP SaaS Platform "Editions": Premium Edition, Professional Edition, and Enterprise Edition and ThingWorx Machine Builder Bundles. Each ThingWorx SCP SaaS Platform Edition includes a designated number of SCP Registered Users, Assets, and ThingWorx SCP SaaS Platform Edition-specific features as set forth in the license profile. The ThingWorx SCP SaaS Platform cannot be installed on the Customer's physical premises or at the Customer's designated hosting provider. An "Instance" means a dedicated deployment of application servers. Each ThingWorx SCP SaaS Platform Edition includes the "ThingWorx agents" or "Edge Microservers" and a ThingWorx SDK used by the Customer to add connectivity into the Customer's run-time applications. The "ThingWorx agents," "Edge Microservers," and Customer's applications created with a ThingWorx SDK are unlimited and distributable with connected products, but only for use with ThingWorx products. ThingWorx agents, and Edge Microservers are non-hosted components of the service and are directly maintained by the Customer.

- ThingWorx SCP SaaS Platform production instance is sized based on the Customer's unique entitlements such as Assets and Registered Users. The system is designed to support a highly secure operational mode and accommodate backup and restore options that support PTC SLA commitments. PTC reserves the right to review Customer implementation for performance, security and scalability concerns to ensure proper performance of the production instance. Customer implementations that create extraordinary usage that negatively impacts performance of Customer system may be subject to additional fees.
- Setup and implementation of Single-sign-On (SSO) services are not included unless specifically purchased via an available PTC offering or otherwise agreed in writing.
- Customers are responsible for all configuration and maintenance of remote Assets. PTC does not provide support for any devices at the edge.
- Customer must maintain that all connected Assets communicate at a minimum-security SSL level of TLS 1.2
  - If Assets are not at specified level, Customer must gain approval from PTC in writing to connect assets to the service
  - PTC reserves the right to disconnect or block communication that does not meet the minimum-security level
- The following Service inclusions are subject to overage fees as defined in the Quote if Customers exceed their allowances:
  - Assets
  - Registered Users
  - Data/Storage
  - Microsoft Azure IoT Hub Usage
  - InfluxDB properties per second

ThingWorx SCP SaaS Platform standard entitlement includes:

	Premium	Professional	Enterprise
Assets (included)	50	75	100
SCP Registered Users (included)	5	5	5
SCP View Only Users (included)	Included	Included	Included
ThingWorx Foundation	Included	Included	Included



ThingWorx Analytics (1)	Not Available	8 cores included	16 cores included
ThingWorx Flow	Not Available	Not Available	Included
Asset Advisor	Included	Included	Included
Software Content Management	Not Available	Not Included	Included
Microsoft Azure IoT Hub	1 unit S1	1 unit S1	1 unit S1
InfluxData InfluxDB (2)	Not Included	Not Included	Not Included
Technical Support	Gold+		
eLearning (Registered Users)	1 license per Registered User		
Success Plan	Starter Success		

1. If the Customer exceeds the compute capacity of the included ThingWorx Analytics cores, the Customer can purchase additional core entitlement for additional compute capacity on any of instance running components that deliver computational functionality.
2. InfluxDB is entitled based on properties per second sent to ThingWorx. A “property” is any data point that is sent from an Asset to ThingWorx. Standard entitlement includes 0.5 properties per second. Additional entitlement may be purchased, and limits will be specified in the Quote.

**ThingWorx Machine Builder:**

The ThingWorx Machine Builder Service Bundle entitles Customers to use the ThingWorx SCP SaaS Service, Vuforia Chalk SaaS, ThingWorx Kepware Edge for SaaS, and other bundled functionality for connecting Customer’s products and for creating and running IoT applications.

See, the “Vuforia Chalk SaaS Offering” Section of this document, which is incorporated herein subject to the additional/different terms and entitlements set forth below.

**ThingWorx Machine Builder Bundle standard entitlements:**

	MBB Tier 1	MBB Tier 2	MBB Tier 3	MBB Tier 4
Assets (included)	25	250	1000	2000
SCP Registered Users (included)	5	5	5	5
SCP View Only Users (included)	Included	Included	Included	Included
ThingWorx Foundation	Included	Included	Included	Included
ThingWorx Analytics (1)	Not Included	Not Included	Not Included	Not Included
ThingWorx Flow	Included	Included	Included	Included
Asset Advisor	Included	Included	Included	Included
Software Content Management	Not Included	Not Included	Not Included	Not Included
Microsoft Azure IoT Hub	1 unit S1	1 unit S1	1 unit S1	1 unit S1
InfluxData InfluxDB (2)	Not Included	Not Included	Not Included	Not Included
<b>ThingWorx Kepware Edge For SaaS (up to 1500 Tags Per Designated Computer)</b>	25	250	1000	2000
Vuforia Chalk Users	5	5	5	5
Technical Support	Gold+			
eLearning (Registered Users)	5 Registered Users			
Success Plan	Starter Success			

The Vuforia Chalk SaaS offerings are entitled by Registered Users. “Registered User” means Users who have a log-in and password and are authorized by the Customer Chalk administrator to use the Chalk application. The Customer Chalk administrator may add and/or substitute from time to time new Registered Users as long as the aggregate number of Registered Users does not exceed at any point in time the number of subscriptions in effect at such time.

**Additional Instances – Production**

Additional production instances may be purchased separately. These instances do not include additional Assets or Registered Users but are entitled as specified above in the standard entitlement. Customer may allocate Assets or Registered Users to a single production or limited production instance. Additional production instances are sized based on the number of devices and users allocated to that particular instance.

**Additional Instances – Non-Production**

Additional non-production (QA and Integration) instances may be purchased separately. These instances do not have limitations on number of Assets or Registered Users, however, are bound by system sizing as specified in the Quote, additional storage may be purchased.



**Additional Databases**

Additional Databases – Production and non-production databases may be purchased separately. Sizing (as defined by CPU Cores) and storage will be specified in the Quote. Customers must purchase at minimum 2 databases to ensure there is a non-production for testing and validation, and a production instance.

**ThingWorx High Availability**

ThingWorx High Availability is an add on to any ThingWorx SCP SaaS entitlement. This entitles the Customer’s production system to be configured with active-active clustering that is included in ThingWorx 9.0 and higher versions. This entitlement does not change any SLA unless otherwise specified in the Quote.

**ThingWorx Kepware Edge for SaaS**

The ThingWorx Kepware Edge for SaaS offering is sold on the basis that a license is needed for each Designated Computer and is limited to the specified number of tags in the product description (generally, one Tag equates to one data item). Designated Computer products are licensed to operate solely on the designated computer on which they are installed. ThingWorx Kepware Edge for SaaS components and functionality may only be used to connect to the ThingWorx SCP SaaS Platform Service that is included with the ThingWorx Machine Builder Service Bundle.

**License Profiles and Allowable Configurations**

License Profiles

The ThingWorx SCP SaaS offerings are entitled by Assets. There are 2 types of Assets that may be entitled.

Normal Asset (IoT) (also sometimes referred to in the product itself or elsewhere as a “Device” or a “Thing” or a “Remote Thing”) means a sensor, device, machine, system, web service, etc. that is modeled (represented) and/or registered as an asset (or “device” or “thing” within the Licensed Product) or any separately defined part of the foregoing if it is being treated as a separate asset within the software. For example, without limitation, an Asset could be a brake press, industrial dryer, another computer system, or a set of individual components within those machines if modeled or registered as a separate asset in the software), etc.

Simple Narrow Band IoT (NB-IoT) or Unconnected Asset means a device that runs on an industry standard Low Power Wide Area Network (LPWAN). These devices are considered remote things on the ThingWorx platform. These assets are differentiated from the Normal Asset due to their connection via LPWAN networks. Additionally, this class of assets includes unconnected assets. Assets of this class include any asset that is created in the offering and represents a physical or virtual asset but is in no way connected to the asset. It is only represented virtually in the offering.

Configurations

Customers are expected to configure the offering via the ThingWorx Interface (Composer). Any customizations or configurations outside of the ThingWorx interface are not allowed. Customers will not have access to the OS or Server level of the offering.

**Data & Devices**

Data Storage Entitlements

Customers are entitled to different levels of storage based on the edition of ThingWorx that they have subscribed to as detailed in this section. In addition, they can purchase additional storage in blocks of 1GB. The total amount of storage a Customer is entitled to is for the ThingWorx production environment and is determined by the total storage of all Customer data in both the ThingWorx file system and the ThingWorx database(s), this is inclusive of all ThingWorx components unless otherwise specified. For the included ThingWorx Integration Environment, 100GB of base storage is included.

All storage entitlements are detailed in the table below:

ThingWorx Edition	Base Storage	Additional Storage Entitlements
ThingWorx SCP Premium SaaS	100GB	0.1GB per additional purchased IoT Asset entitled 0.0045GB per additional purchased NB-IoT Asset
ThingWorx SCP Professional SaaS	100GB	0.1GB per additional purchased IoT Asset entitled 0.0045GB per additional purchased NB-IoT Asset
ThingWorx SCP Enterprise SaaS	100GB	0.1GB per additional purchased IoT Asset entitled 0.0045GB per additional purchased NB-IoT Asset
ThingWorx Machine Builder Bundles (all)	100GB	0.1GB per additional purchased IoT Asset entitled 0.0045GB per additional purchased NB-IoT Asset
ThingWorx Non-Production Environment	100GB	None

Example:

Customer purchases ThingWorx SCP Enterprise SaaS with 100 additional normal assets:

Customer Production environment entitled to: 100GB + (100 \* .1) = 110GB total storage



## Data Export Formats

Export of the service consists of service configuration and data. This data can be exported in 2 formats

- Export of all entities via ThingWorx Export functionality, delivered as XML and JSON files
- Export of the database(s) according to each database standard export format

Additionally, any files in the ThingWorx Storage repositories will be provided in a ZIP format.

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## ThingWorx SCO SaaS Platform Service

### Introduction

This offering provides Customer access to the ThingWorx SCO SaaS Platform Service for connecting Customer's factories and for building and running IoT applications. The ThingWorx SCO SaaS Platform Service may not be used for smart connected product purposes (i.e., developing applications to enable internet-connectivity for and/or remote management of products made and/or sold by Customer).

### Solution Scope

ThingWorx SCO SaaS Platform is available as a standard service package with optional services that can be purchased separately.

ThingWorx SCO SaaS Platform Standard Services include:

- Users in the quantity specified below for each the configuration purchased by Customer
- Connectivity to Assets via Kepware or any other supported edge agent technology
- Connectivity to Microsoft Azure IoTHub
- A single dedicated production instance and a single non-production instance
- Storage allocation as specified below
- A total of 12 Named Service Requests per calendar year across all purchased environments.
- Standard Service Management as specified in the Support Terms and Conditions document

### Offering Basis

- The ThingWorx SCO model allows Customers to license the IoT Platform for connecting and monitoring Customer's internal manufacturing systems, processes, and/or operations related to the production of Customer products, using a Registered User-based model.
- Customers are responsible for all configuration and maintenance of remote Assets. PTC does not provide support for any devices at the edge.
- Setup and implementation of Single-sign-On (SSO) services are not included unless specifically purchased via an available PTC offering or otherwise agreed in writing.
- Customer must maintain that all connected Assets communicate at a minimum-security SSL level of TLS 1.2
  - If Assets are not at specified level, Customer must gain approval from PTC in writing to connect assets to the service
  - PTC reserves the right to disconnect or block communication that does not meet the minimum-security level
- The following Service inclusions are subject to overage fees as specified in the Quote if Customers exceed their allowances:
  - Registered Users
  - Data/Storage
  - Microsoft Azure IoTHub Usage
  - InfluxDB Properties per Second

### License Profiles and Allowable Configurations

#### License Profiles

The ThingWorx SCO SaaS offerings are entitled by any of the following Manufacturing Sites, Registered Users and/or Use Cases as specified in the configurations below.

#### Configurations

There are several configurations that Customer may purchase: the ThingWorx SCO SaaS Platform, the ThingWorx SCO SaaS Multi-Site Platform with the entitlements specified below.

**ThingWorx SCO SaaS Platform (Professional, Enterprise)** entitlement includes:

	Professional	Enterprise
SCO Registered Users (included)	10	15



Manufacturing Sites	1	1
ThingWorx Foundation	Included	Included
ThingWorx Analytics (1)	Not Available	16 cores included
ThingWorx Flow	Not Available	Included
Manufacturing Apps (2)	Included	Included
Software Content Management	Not Available	Not Included
Microsoft Azure IoT Hub	1 unit S1	1 unit S1
InfluxData InfluxDB (3)	Not Included	Not Included
Technical Support	Gold+	
eLearning (Registered Users)	1 license per Registered User	
Success Plan	Starter Success	

Additional Manufacturing Sites may be purchased to add on to these offerings

### ThingWorx SCO SaaS Multi-Site Platform

ThingWorx Multi-Site model has the following standard entitlements:

SCO Registered Users (included)	100 per site
ThingWorx Foundation	Included
ThingWorx Analytics (1)	16 cores included
ThingWorx Flow	Included
Manufacturing Apps (2)	Included
Software Content Management	Not Included
Microsoft Azure IoT Hub	1 unit S1
InfluxData InfluxDB (3)	Not Included
Kepware Servers	Unlimited
Technical Support	Gold+
eLearning (Registered Users)	1 license per Registered User
Success Plan	Starter Success

The offering includes 1 production ThingWorx SCO SaaS Environment and 1 non-production environment. Additional environments for manufacturing sites or regions may be purchased as Additional Production instances.

1. If the Customer exceeds the compute capacity of the included ThingWorx Analytics cores, the Customer can purchase additional core entitlement for additional compute capacity on any of instance running components that deliver computational functionality
2. Some Manufacturing Apps require an additional relational database. Customers must purchase an Additional Database to support this functionality
3. InfluxDB is entitled based on properties per second sent to ThingWorx. A property is any data point or Kepware tag that is sent from an asset to ThingWorx. Standard entitlement includes up to 500 properties per second. Additional entitlement may be purchased, and limits will be specified in the Quote.

### Additional Manufacturing Sites

Additional Manufacturing Sites may be purchased to add on to the ThingWorx SCO SaaS Premium and Enterprise Editions. The additional sites do not include any additional Registered Users or any other entitlements. The Additional Site entitles the Customer to use the ThingWorx SCO SaaS Offering environment that is included at as many sites as specified in the Quote.

Example:

Purchase ThingWorx SaaS SCO Enterprise + 2 Additional Sites

Customer will be entitled to:

1 production environment

1 non-production environment

Entitlement to connect up to 3 Manufacturing Sites to the above production environment

### Additional Instances – Production

Additional production instances may be purchased separately and can be used to support multiple manufacturing sites or regions. These instances do not include additional Registered Users but are entitled as specified above in the standard entitlement. This will entitle the Customer to connect an additional manufacturing site that is deployed on a separate ThingWorx production instance that is subject to PTC Service Level Agreement (SLA), Service Level Targets (SLT) and other terms as described in the General Terms and Conditions.



Customer may allocate Registered Users to a single production instance. Additional production instances are sized based on the number of users allocated to that particular instance.

#### **Additional Instances – Non-Production**

Additional non-production (QA and Integration) instances may be purchased separately. These instances do not have limitations on number Registered Users, but are bound by system sizing as specified in the Quote. Additional storage may be purchased.

#### **Additional Databases**

Additional Databases – production and non-production databases may be purchased separately. Sizing (as defined by CPU Cores) and Storage will be specified in the Quote. Customers must purchase at minimum two databases to ensure there is a non-production for testing and validation, and a production instance.

#### **ThingWorx High Availability**

ThingWorx High Availability is an add on to any ThingWorx SCO SaaS entitlement. This entitles the Customer’s production system to be configured with active-active clustering that is included in ThingWorx 9.0 and higher versions. This entitlement does not change any SLA unless otherwise specified in the Quote.

#### **ThingWorx Kepware Edge for SaaS**

The ThingWorx Kepware Edge for SaaS offering is sold on the basis that a license is needed for each Designated Computer and is limited to the specified number of tags in the product description (generally, one Tag equates to one data item). Designated Computer products are licensed to operate solely on the designated computer on which they are installed. ThingWorx Kepware Edge for SaaS components and functionality may only be used to connect to the ThingWorx SCP SaaS Platform Service that is included with the ThingWorx Machine Builder Service Bundle.

### **Data & Devices**

#### Data Storage Entitlements

Customers are entitled to different levels of storage based on the edition of ThingWorx that they have subscribed to as detailed in this section. In addition, they can purchase additional storage in blocks of 1GB. The total amount of storage a Customer is entitled to is for the ThingWorx production environment and is determined by the total storage of all Customer data in both the ThingWorx file system and the ThingWorx database(s), this is inclusive of all ThingWorx components unless otherwise specified. For the included ThingWorx Integration Environment, 100GB of base storage is included.

All storage entitlements are detailed in the table below:

ThingWorx Edition	Base Storage	Additional Storage Entitlements
ThingWorx SCO Premium SaaS	325GB	None
ThingWorx SCO Enterprise SaaS	1325GB	None
ThingWorx SCO Multi-Site SaaS	1325GB	100GB Per Site
ThingWorx SCO Use Case SaaS	1325GB	50GB Per Use Case
ThingWorx Non-Production Environment	100GB	None

Example:

Customer purchases ThingWorx SCO Multi-Site SaaS with 5 sites:

Customer production environment entitled to:  $1325\text{GB} + (5 * 100\text{GB}) = 1825\text{GB}$  total storage

#### **Data Export Formats**

Export of the service consists of service configuration and data. This data can be exported in 2 formats

- Export of all entities via ThingWorx Export functionality, delivered as XML and JSON files
- Export of the database(s) according to each database standard export format

Additionally, any files in the ThingWorx Storage repositories will be provided in a ZIP format.

#### **Data Export**

Depending on the solution(s) purchased, data export will include applicable items from the following: Database schema export, ThingWorx entity configuration export, file system contents





## Creo AR Design Share

Creo AR Design Share is a product that enables Creo users to publish models directly from Creo to a PTC-hosted server to be consumed as an Augmented Reality experience through the use of ThingWorx View.

Product	Availability	Publishing Admins	Publishers	Published models allowed	Control
Creo AR Design Share – free	Free to every seat of Creo 4.0 M010+	1	1	5	<ul style="list-style-type: none"> <li>Only 5 models can be hosted on free experience server at one time and each will expire 6 months after it is published</li> <li>Customer has no control over deleting published models; when the sixth model is published, the oldest published model hosted on the server will be automatically deleted</li> <li>Once published, the model is viewable by anyone. There is no password or other protection.</li> </ul>
Creo AR Design Share – Individual	For purchase with Creo 4.0 M040+	1	1 (same person as Admin)	10	<ul style="list-style-type: none"> <li>Admin/Publisher has full control over the published models, and can delete any models at any time</li> <li>Access to published models can be restricted by the Admin/Publisher</li> </ul>
Creo AR Design Share – Enterprise	For purchase with Creo 4.0 M040+	1	Unlimited	50	<ul style="list-style-type: none"> <li>Admin has full control over all account models, and can delete any models at any time</li> <li>Publishers have full control over models they have published, and can delete any models they published at any time</li> <li>Admin can add/delete any Publisher at any time</li> <li>Access to published models can be restricted by the Admin/Publisher</li> </ul>



## Vuforia Chalk SaaS Offering

Vuforia Chalk SaaS is a cloud-based service that enables users to mark-up live views to highlight details or multi-step instructions through the Vuforia Chalk application on mobile computing devices. The Vuforia Chalk SaaS Offering is available in two packages.

- **Vuforia Chalk Users:** This offering is sold on a Registered User basis. A Registered User is an individual who has been assigned a log-in by the Customer administrator (“Customer Chalk Admin”) to initiate Vuforia Chalk sessions (“Sessions”). The Customer Chalk administrator may add and/or substitute from time to time new Registered Users as long as the aggregate number of Registered Users does not exceed at any point in time the number of subscriptions in effect at such time.
- **Vuforia Chalk Users with Host Privileges:** This offering entitles the Customer to designate Chalk Registered Users as Hosts. A “Host” is a Registered User who has been designated with the ability to start Sessions with end-users of the Vuforia Chalk application (“Guests”). The Customer Chalk Admin designates the Registered Users who have Host privileges. The Customer Chalk Admin may add and/or substitute from time to time new Hosts as long as the aggregate number of Hosts do not exceed at any point in time the number of subscriptions in effect at such time. A Host is authorized to generate and provide unique numerical codes (“Connect Codes”) to Guests which authorizes Guests to attend a Session. Host privileges may not be shared or used by anyone other than the Registered User assigned to be a Host.

Each package provides access to the Vuforia Chalk Admin Center web application (defined below) and the Vuforia Chalk mobile application (which is required to be download from a mobile app store where additional terms of use may apply). Additional terms shall apply to the use of the Chalk application and will need to be agreed to by users at the time the Chalk application is downloaded.

### Administration of Vuforia Chalk SaaS Offering

Customer Admin(s) may add, deactivate or delete a Registered User’s account via the Vuforia Chalk Admin Center (the “Admin Center”). Customer is responsible for maintaining the confidentiality of passwords and admin accounts, and managing access to and use of Admin accounts. PTC’s responsibilities do not extend to the internal management or administration of the Services for Customer. A Registered User account may be managed only by the Customer Admin and used by a single Registered User. The Customer shall be responsible for the acts and omissions of its Registered Users and Guests in connection with their use of the Services.

### Security of User Accounts

Customer is responsible for any activity that occurs under Customer admin accounts and Registered User accounts. It is important that Customer and Registered Users keep accounts secure.

By using the Services, Customer shall not, and shall not permit Registered Users to:

- buy, sell, rent, or lease access to Registered User accounts;
- share passwords;
- log in or attempt to access the Services through third-party applications or clients.

Customer agrees to notify PTC immediately of any breach of security with respect to a Registered User account including passwords. PTC will not be liable for any loss that Customer may incur as a result of a third party using a Registered User account, either with or without Customer’s knowledge, or for any data or content viewed while using the Services. In addition, Customer may be held liable for any losses incurred by PTC or another party due to an unauthorized third party using a Registered User account.

### Security Measures

With respect to Vuforia Chalk, PTC follows the below standard security practices

- Data in transit across open networks is encrypted
- Network and web application firewalls
- Configuration monitoring, network traffic logging and monitoring
- Authentication controls, authorization rules and auditing of administration actions

### Data Export

Upon approaching the end of the applicable Service Period, Customer may request that PTC extract Hosted Data available for export. Otherwise, Hosted Data will be deleted from the Hosted System after expiration or termination of the applicable Services Term.



## Vuforia Expert Capture SaaS Offering

The Vuforia Expert Capture SaaS Offering is licensed based on an initial purchase that includes a specified number of Registered Users. Additional Registered Users may be purchased on a committed basis.

### Vuforia Expert Capture SaaS Offering includes the following components:

#### Vuforia Capture

The Vuforia Capture application is used to create Captures consisting of photos, audio, video and, on certain devices, spatial data for location awareness. Registered Users will be required to download the application from an application store. Additional terms of use may apply to use the Vuforia Capture application and will need to be agreed to at the time of registration or download.

#### Procedure Editor

The Procedure Editor may be accessed through a web browser by Registered Users in order to author Procedures.

#### Vuforia View

The Vuforia View application presents Procedures as Experiences to Registered Users. Registered Users will be required to download the application from an application store. Additional terms of use may apply to use the Vuforia View application and will need to be agreed to at the time of registration or download.

#### Data Export

Customer may export Procedures from the Procedure Editor anytime during the Service Term to Word or any other digital format that may become available. Otherwise, Hosted Data will be deleted from the Hosted System after expiration or termination of the applicable Service Period.

#### Success Services

PTC will provide the Success Services described in the Success Plan Terms and Conditions posted on <http://www.ptc.com/legal-agreements> only to Customers who buy directly from PTC. Customers who purchase Vuforia Expert Capture from PTC partners may be entitled to success services from such partners.

#### Security Measures

With respect to Vuforia Expert Capture, PTC follows the below standard security practices

- Data in transit across open networks is encrypted
- Network and web application firewalls
- Configuration monitoring, network traffic logging and monitoring
- Authentication controls, authorization rules and auditing of administration actions

## Vuforia Studio SaaS Offering

### Vuforia Studio

There are different Vuforia Studio bundles: Starter, Basic, Premium, Professional and Enterprise. Each bundle includes the Vuforia Studio Experience Creator, the Experience Service (licensed on a Designated Server basis), Views and the Vuforia View Application with Bundle-specific features as set forth in the table below. Vuforia Studio licenses allow the Customer to access and use the ThingWorx platform for user administration purposes only; any additional use cases require purchase of a ThingWorx IoT platform edition.

#### Definition of “View”

A “View” (also referred to as an “Experience” or “EXP”) is a presentation of a mix of textual, numeric and 3D data that is presented to a user by the Vuforia View application. The View may include augmented reality interaction and/or “live” data from Things via ThingWorx. A View has a definite “entry point” which is invoked via a user action to select the View. This may be by selecting a “bookmarked” experience, following a scan of a ThingMark, or scanning a designated QR code. There is no definite “exit point” other than exiting Vuforia View or requesting another View. Invoking the same View within 15 minutes will count as a single View. Examples of Views include, without limitation:

- A service experience to instruct a service technician how to perform a service procedure
- A marketing experience to present capabilities of a product to consumers
- A monitoring experience to display live data streaming from a machine

#### Bundles

Each Vuforia Studio Bundle comes with the entitlements specified in the table below:



	Starter	Basic	Premium	Professional	Enterprise
Registered Users (included, more may be purchased separately)	20	100	200	1,000	10,000
Annual Views (for non-Registered Users)	2,500	5,000	10,000	50,000	100,000

### Registered Users

Customers may purchase additional Registered Users for users who will author and/or consume Views. There is no limit on the number of Views that may be consumed by Registered Users. Registered User licenses must be issued to persons accessing the A/R experiences who are either (i) employees or contractors of or otherwise engaged by the Customer or (ii) who receive login accounts/passwords to the Customer's Studio instance.

### Non-Registered Users

Customers may purchase additional public Views for consumption by individuals who are not Registered Users (up to the number of Views purchased).

### Security Measures

With respect to Vuforia Studio, PTC follows the below standard security practices

- Data in transit across open networks is encrypted
- Network and web application firewalls
- Configuration monitoring, network traffic logging and monitoring
- Authentication controls, authorization rules and auditing of administration actions