Windchill+ and Navigate for Windchill+ Service Description

Your use of Windchill+ offerings and the Navigate for Windchill+ offering are subject to the terms of the PTC Master SaaS Agreement (the **"Agreement"**) as well as the following additional terms. Any capitalized terms used but not defined below have the meanings in the Agreement.

Defined Terms

"Active Daily User" means that the product is contracted on the basis of the number of unique users who access a Windchill Navigate application at any time during a 24-hour calendar day. For example, if a user accesses a Windchill Navigate application 3 times on a Monday and 2 times on the following Friday, then the user is counted as an active user for Monday and Friday only. The 24-hour period is defined using the time zone set for the connected Navigate server.

"Demo and Test": Products contracted on a "demo and test" or "non-production" basis (or similar designation), such Service may not be used in a production environment.

A "Kiosk User" license enables a device (e.g., on a factory shop floor) to be treated as one Registered User with limited privileges in Windchill Navigate and Windchill+. This license is intended for use by Customers who do not wish to maintain distinct Registered User accounts for multiple shop floor workers.

"Per Environment" means that the product is contracted on the basis of the number of instances of such product. For example, if Customer wants to have two production instances that include such product, two licenses are required. Similarly, if Customer wants to have a production environment and two non-production environments that include such product, three licenses are required. Offerings that are contracted on a Per Environment basis are designated as such by having the phrase "per environment" in the part description.

"Registered User" has the meaning defined in the Agreement.

Data Export

Once the Service End Date is known, 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. Customer may, however, contract with PTC for additional non-standard data export for additional fees. PTC will retain Customer's 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. 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.

Updates and Upgrades

PTC publishes the release dates for Windchill+ updates and versions in the Product Release Calendar (support.ptc.com/cs/release-calendar/index.html). The Release Date stated in the Product Release Calendar is the date on which the given version or update will be made available for adoption by Windchill+ customers. The actual timing of a specific update or upgrade must be planned and agreed between Customer and PTC. Windchill+ customers may elect to adopt every new version, or every other new version, but may at no time use a version that has reached the Standard Support End Date. Customers that elect to adopt every other major version will be required to adopt a Maintenance Release between version upgrades to ensure that security updates are always available.

Back Ups and Restoration

Full system backups are taken on a daily basis, and stored in geo-redundant locations. Production system backups are maintained for 30 days. Non-production backups are maintained for 7 days. PTC is not able to restore individual files that are deleted through the Licensed Product, but PTC can perform full system restoration from backup upon Customer request.

Disaster Recovery

In the event of a wide-scale service outage, PTC will work with impacted Customers to determine if the Disaster Recovery protocol should be implemented. If needed, the Recovery Point Objective (RPO) for production systems is 24 hours, and the Recovery Time Objective (RTO) for production systems is 5 days. Non-production systems will be restored as quickly as possible after all production systems are fully restored.

Security and Data Privacy

Information about the security program for this Service is located at PTC's Trust Center.

Information about data that is collected as part of the Service is located at www.ptc.com/en/documents/policies.

User Identity Management

All Windchill+ Offerings require the use of a Customer-managed Identity Provider (IdP) for user authentication (and only one IdP may be used). Customer is responsible for providing PTC with the necessary configuration information required to integrate the IdP with the PTC Central Authentication Server (CAS). For additional information, please refer to the "Initial System Configuration" section of the Windchill+ Service Guide, under Customer Onboarding > Basic Access and Configuration > Basic Access and Configuration. Note that only a single Customer-provided IdP is allowed. Additional IdPs may be integrated by the Customer using Federated Identity Management.

Integrations and Customizations

PTC is not obligated to host for Customer any customizations or custom applications unless specifically agreed in the Order Form that PTC will host the same. The Windchill+ Help Center (https://support.ptc.com/help/windchill/plus/r12.0.2.0/en/) identifies the configurations, customizations and integrations that are permitted. Configurations, customizations and integrations that are not identified in such document are not permitted.

Batching

For contract types based on numbers of users (e.g., Registered User, Concurrent User, etc., but not Kiosk Users), a license is required for each individual who accesses such Service or the functionality or data contained therein, whether directly or through a web portal or other mechanism for "batching" or otherwise achieving indirect access to the Service or such functionality or data. Generic or shared log-ins are not permitted.

Without limiting the foregoing, without express written permission from PTC, the Customer is expressly prohibited from using (directly or via an application created by Customer or a third party) the application program interface of the Service to extract data from the Service for the purpose of training, fine-tuning, or creating an artificial intelligence (AI) model or building a data source such as a Retrieval Augment Generation (RAG), whether for internal use or external distribution. In the event that Customer receives such permission, all users of any application(s) that leverage such AI model or data source must have a Registered User license to the Service, regardless of whether such users in fact access the Service directly (and in the event Customer acts in contravention of the foregoing restriction, the requirement to assign a Registered User license to such users shall not be PTC's sole remedy). Also, all users of any application(s) that leverage such AI model or data source must only use PTC-supported APIs of the respective Service. The parties acknowledge that the way the Service structures data and respective databases are proprietary and any permission from PTC to access the Service with application(s) that leverage such AI model or data source is not meant to derogate from the proprietary nature of such data structures and databases.

Windchill+

Introduction

This offering provides Customers with a SaaS environment that includes a comprehensive set of PLM capabilities described below and supports integration with external systems (such as ERP and CRM). Optional environments/services can be purchased separately.

Offering Basis

Windchill+ is contracted on a Registered User basis. There are defined types of Registered User profiles that may be purchased: **Viewer, Contributor, Author**. Additional functionality role-based license types may be added to the Author user profile. Each profile grants the assigned User access only to the functionality entitled by that profile. Customer is 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.

Standard Entitlements

All subscriptions include access to one Production Instance and one Non-Production Instance. Additional Non-Production Instances may be added to the subscription, as purchased. A given subscription may only have a single Production Instance. If Customer requires multiple Production Instances, for example to support different business units that require incompatible configurations, a separate subscription is required for each. Customer must specify the URL Prefix that will be applied for all instances, and may chose a URL Suffix for Non-Production Instances from a set of available options provided by PTC. Customer provided domain names are not supported.

Publishing Entitlements

Customer is entitled to publishing capability for supported Microsoft Office applications (as specified in the Release Matrix for the applicable Windchill+ version, which is located at support.ptc.com/cs/release-calendar/index.html) with a limit of 300 publishing jobs per Author user per month (measured across all Author users).

Customer is entitled to publishing capability for supported Creo versions (as specified in the Release Matrix for the applicable Windchill+ version, which is located at support.ptc.com/cs/release-calendar/index.html) with a limit of 125 publishing jobs per Designer user per month (measured across all Designer users). For other CAD applications, Customer is required to purchase publishing capacity for each such CAD application based on the number of users and environments where such publishing is required.

Additional publishing jobs (both for Microsoft Office and for CAD applications) used in excess of these limits will be billed as overage on a contract-year basis.

For Customers that purchase a "SaaS Windchill Migration Environment," additional publishing demand caused by the migration will count against the limits to the extent that the document(s) are not the latest released versions of such document(s). For example, if Customer has publishing jobs caused by a migration and such jobs are the latest versions of the applicable documents, such publishing jobs will not count towards the limit.

When Customer is using third party CAD software with the Service, it is necessary for PTC to install and run such third-party CAD software alongside the Service so that neutral format viewables can be generated. In such cases, for PTC to install and run such third-party software for Customer, the Customer will be required to provide to PTC VPN access to Customer's license server so that the third-party CAD software being run alongside the Service can access Customer's license file for such software. Customer shall secure authorization from the third-party CAD vendor for PTC to host such third-party CAD software alongside the Service, and Customer will provide all necessary installation media and files as required for PTC to deploy such applications alongside the Service.

Data Storage Entitlements

Vault Content Data Storage: Customers are entitled to the vault content data storage on a per Registered User basis depending on the role (measured across all licenses), as specified in the table below. 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.

Type	Storage Allotment per User
Author (with Designer)	100 GB
Author	20 GB
Contributor	0 GB
Viewer	0 GB

Database Storage: The Windchill+ service includes an allocation of database storage per User (up to 2GB per Author, and 1GB per Contributor, with none allocated for Viewers), measured in the aggregate across all Customer environments. Consumption of database storage in excess of Customer's entitlement will be billed at the then-current list price for excess storage.

Additional Storage: Customer is required to purchase additional storage capacity for data migrations and/or system integrations.

Audit Log Retention: Windchill+ will retain up to 90 days of Audit Log data. Customer may configure which system actions (view, delete, download, etc.) are captured in the audit history, but not the retention period. All Audit Log data is automatically exported to the Customer's integration storage container every 30 days, and may be downloaded by Customer for archiving. The integration storage container has a data retention policy of 7 days.

Integrations

Purchase of Viewer and/or Contributor licenses includes access to both Windchill+ and Navigate for Windchill+ standard capabilities. See the Navigate for Windchill+ section below for additional information.

Windchill+ supports integration with other PTC SaaS solutions as defined in the Release Matrix for the applicable Windchill+ version as documented on the Product Release Calendar (support.ptc.com/cs/release-calendar/index.html)

Windchill+ supports integrations with on-premises systems (hybrid use cases) such as ERP, MES,CRM, or any other client over secure REST API using OAuth. The OAuth credentials will be maintained in the PTC hosted CAS Server. In all cases, integration with external systems must remain compliant will all applicable license terms and conditions.

Windchill+ supports the embedded mashups within the Windchill UI only with Navigate for Windchill+ offering. This capability is not supported with a hybrid use case.

Windchill+ Development Environment

If Customer purchases one or more Windchill+ Development Environment(s), Customer acknowledges that Customer's access to such environment(s) are equivalent to administrator access and it is Customer's responsibility to apply all available security patches and upgrades to such environment(s). Customer also acknowledges that it has the ability to alter the security settings of such environment(s), which may negatively affect the security profile of such environment(s), and PTC will have no responsibility for security breaches or incidents caused by such alterations. PTC will not apply security patches/upgrades to such environment(s), and if Customer fails to do so or if Customer has altered the security settings, PTC may disable the environment(s) until Customer has remedied the issue(s).

Windchill+ Medical Device

In addition to all of the above terms applicable to Windchill+, the following additional terms apply for the Windchill+ Medical Device offering.

USDM Life Sciences is a trusted PTC partner with over 20 years of experience in the GxP industry. For more information, refer to https://usdm.com.

The USDM Baseline Assurance Package was developed to assure that the baseline, out-of-box, pre-configured Medical Device SaaS workflows and the base functionality that they utilize perform as expected for their baseline intended use. This plan also verified the deployment process that PTC used to create a Medical Device SaaS environment for a Customer. The Baseline Assurance Package accelerates the Customer's ability to meet the FDA's 21 CFR Part 11 and other global computer system validation requirements.

The Baseline Assurance Package also includes the USDM Vendor Audit and Assurance Report, which is updated annually. The Baseline Assurance Package is included in the Windchill+ Medical Device base entitlement. Customer-specific validation artifacts are not included in this offering, and are the responsibility of the Customer to create or contract with a qualified service partner, such as USDM, to create.

While life science companies remain responsible for validating their own use of vendor products and services to ensure they meet applicable regulatory requirements, this Baseline Assurance Package may be leveraged as documented evidence of PTC's procedures, coupled with the results of the USDM-performed vendor audit.

The Windchill+ Medical Device Offering is contracted on a Registered User basis. There are defined types of Registered User profiles that may be purchased: Read & Approve, Contribute, and Author. The Medical Device role-based add-ons may only be used in conjunction with the Windchill+ Medical Device Author license. It is not permitted to combine Windchill+ Medical Device Author and Windchill+ Select Author user types. Furthermore, it is not permissible to utilize Windchill+ Select licenses in place of Windchill+ Medical Device licenses for substantially equivalent functionality. As an example for the avoidance of doubt, the Windchill+ Design Lite license may not be utilized in place of the Windchill+ Design Control license.

Navigate for Windchill+

Introduction

Navigate for Windchill+ provides a SaaS solution that connects to a Windchill+ instance and for additional fees supports integration with select external on-premises and cloud systems such as ERP and CRM (excluding on-premises Windchill systems). Optional services and environments are available for purchase to meet specific business needs.

Offering Basis

This offering is contracted on the basis of Registered Users, Active Daily Users, or Kiosk Users. Kiosk User licenses may only be assigned the "view" profile. Registered User and Active Daily User licenses allow assignment of two license profile types: View and Collaborate. Each license profile grants access only to the functionality entitled by that profile, and the Collaborate profile includes all View capabilities. Customers must allocate users to license profiles within the Navigate for Windchill+ production environment. Failure to manage user profiles appropriately may result in overage fees, and PTC is not responsible for incorrectly managed users.

All users and groups entitled to use Navigate must be associated with the corresponding Windchill+ license group. For example, users assigned a Windchill Navigate View license must be members of a group associated with a PTC Windchill+ View and Print Only license profile.

Standard Entitlements

Each subscription includes access to one production instance and one non-production instance. Additional non-production instances may be purchased. Integration is provided between a single Navigate for Windchill+ instance and a single Windchill+ instance for each included environment. Customers receive a total of twelve Named Service Requests (other than Build Deployments, which are not subject to a cap) per year across all environments, with the option to purchase additional requests. No additional storage or publishing entitlement is required or provided via the Navigate for Windchill+ offering, as all content generated by or uploaded to Navigate is stored in the Windchill+ database and vaults.

Functional Capabilities

Navigate for Windchill+ View license grants the right to view information through components bundled with Windchill Navigate View apps. Users may use ThingWorx Composer and administration capabilities to configure application components (mashups, widgets,

shapes, templates) bundled with Windchill Navigate apps. Direct login to Windchill+ with view privileges is limited to basic Windchill capabilities, including full-text and database searches, traversing cabinet/folder structures, viewing properties pages, downloading non-CAD file content, printing objects, and viewing or measuring 3D viewables in Creo View (without markup).

Navigate for Windchill+ Collaborate license supports all the capabilities included under a Windchill Navigate View license as well as those exposed in the PTC Collaborate License Profile.

Windchill Navigate Base

This license entitles a user to use the ThingWorx Composer and ThingWorx Mashup Builder to create Navigate custom apps and connect to PTC and third party enterprise systems to both view as well as to create and update information in the connected systems. Each user of the custom app must have the requisite view, create and update privileges to the content of connected system that is exposed in the Navigate custom authoring app. For example, each user who uses a Navigate custom app that is connected to Windchill must have this license and a corresponding View, Collaborate, or Author license in Windchill+ depending upon the capabilities of the custom app.

The Windchill Navigate Base license may be used by Customer to connect to enterprise systems (e.g., Oracle ERP, SAP, CRM systems, etc.) and to connect to PTC's Windchill+ products. One Windchill Navigate Base is required for each Windchill+ production instance which uses Navigate Custom apps.

Limitations

- The Navigate for Windchill+ View license does not authorize creation or editing of information, exporting data to other systems, acquiring information from non-PTC solutions, building integrations beyond bundled components, or connecting to physical devices.
- Navigate for Windchill+ apps may only connect to software systems; connections to physical devices are not permitted which can include but is not limited to connected products, wearables, production machinery, and physical assets – or any edge servers or services that devices are connected to.
- Navigate for Windchill+ apps may not be used to connect to manufacturing systems, processes, and/or operations belonging to the Customer's internal production facilities or the production facilities of the Customer's suppliers.
- Microsoft Azure IoT Hub is not included.
- Connections to additional systems beyond standard inclusions require separate purchase and definition in the Quote.
- Active Daily User licenses allow overages; consumption is not limited to the contracted number of users. Except for the Kiosk User licenses which does not allow overages.
- Using Navigate as a data warehouse in the Windchill+ offering is not allowed. An additional database hosted by PTC may be purchased at an additional cost, for custom mashup metadata storage.
- Storing files in the database is not permitted.