



Huntsville, Alabama

308 Fountain Circle
Huntsville, AL 35801

Cover Memo

Meeting Type: City Council Regular Meeting **Meeting Date:** 10/27/2022

File ID: TMP-2162

Department: ITS

Subject:

Type of Action: Approval/Action

Resolution authorizing the Mayor to enter into an agreement between the City of Huntsville and Hyland Software, Inc. for the Hyland OnBase software upgrade.

Resolution No.

Finance Information:

Account Number: 1000-17-17100-515250-00000000-

City Cost Amount: \$26,950.00

Total Cost: \$ \$26,950.00

Special Circumstances:

Grant Funded: N/A

Grant Title - CFDA or granting Agency: N/A

Resolution #: N/A

Location:

Address: N/A

District: District 1 ☐ District 2 ☐ District 3 ☐ District 4 ☐ District 5 ☐

Additional Comments:

Hyland OnBase Software Upgrade

RESOLUTION NO. 22-_____

BE IT RESOLVED by the City Council of the City of Huntsville, Alabama that the Mayor be, and he is authorized on behalf of the City of Huntsville, a Municipal Corporation in the State of Alabama, to enter into an Agreement by and between the City of Huntsville, Alabama, and Hyland Inc. which said Agreement is substantially in words and figures similar to that certain document attached hereto and identified as "Global Services by Hyland Professional Services Proposal", consisting of nineteen (19) pages, and the date of October 27, 2022 appearing on the margin of the first page, together with the signature of the President or President Pro Tem of the City Council, an executed copy of said document being permanently kept on file in the office of the City Clerk-Treasurer of the City of Huntsville, Alabama.

ADOPTED this 27th day of October 2022.

President of the City Council of the
City of Huntsville, Alabama

APPROVED this 27th day of October 2022.

Mayor of the City of Huntsville,
Alabama



PROFESSIONAL SERVICES PROPOSAL

City of Huntsville

Document Version: 3

Document Date: 22 Sep 2022

THIS PROPOSAL WILL EXPIRE **90**
DAYS FROM THE ABOVE DATE
UNLESS SIGNED BY BOTH PARTIES.

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Details in this document are based on information given to Hyland Software Inc. and its affiliates and, therefore, subject to change. This document does not represent a commitment on the part of Hyland Software Inc. and its affiliates until executed by both parties and incorporated by reference into a services contract in accordance with the terms of such services contract.

The information contained in this document is confidential and proprietary to Hyland Software Inc. and its affiliates. It is provided solely for the use of City of Huntsville to describe the approach and work being proposed. This information may not be used for any other purpose and may not be further distributed. Any recipient of this document who is unwilling to agree to these conditions should return the document to Hyland Software Inc. and its affiliates without reviewing the contents or making further distribution. Review of this document shall constitute agreement to the restrictions stated above.

RFS# 44995136 (Hyland internal request tracking number)
HSI#: 14498 (Hyland internal Customer number)

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INTRODUCTION

The purpose of this document ("Services Proposal") is to define the goals, scope, fees and other important details supporting the delivery of Professional Services for one or more projects defined in the Project Areas section.

PROPOSAL TERMS & USAGE

Hyland Software Inc. ("Hyland") is pleased to provide the following estimate for professional services related to the use of the OnBase® Information Management System software ("Software") for City of Huntsville ("Customer") as described in the Project Areas section of this document.

The content of this Services Proposal is subject to review and revision by both Hyland and Customer until fully executed by both parties.

Upon execution of this Services Proposal, the Hyland project manager or designated resource will contact Customer project team to discuss project logistics and potential start dates. At this time, Hyland resource availability will be reviewed and presented to Customer. Start times can vary based on existing work volumes. The project(s) will begin upon a mutually agreed upon date as soon as resource availability and Customer availability allow. Once the project start date has been determined, resources will be assigned and scheduled to begin delivery of the services described in this Services Proposal.

Services described in this Services Proposal will be provided in accordance with the terms of the applicable services contract between the parties within which this Services Proposal is incorporated. Such services contract may be a stand-alone services agreement or may be included within the agreement under which Customer licenses software from Hyland, such as a Master Software License, Services and Support Agreement, Hosting Agreement, Subscription Agreement or Framework Agreement. If such services contract provides that services will be provided under a Statement of Work, this Services Proposal shall be considered the Statement of Work. All terms of any purchase order or similar document provided by Customer including but not limited to any Customer pre-printed terms and any terms that are inconsistent or conflict with this Services Proposal shall be null and void.

Please note that some of the resources assigned to perform the Services may be employees of Hyland Software, Inc.'s subsidiaries located in other countries, or may be employees or agents of a third party subcontractor, and Customer's execution of this Services Proposal hereby constitutes consent of the Customer to Hyland Software, Inc.'s engagement of such resources.

After execution, all changes to this Services Proposal will follow the Project Change Control Process. All changes must be made to this Services Proposal through an authorized Change Order unless otherwise agreed to in writing by both Hyland and Customer.

PROJECT AREAS

Hyland will provide the following Professional Services described within this Services Proposal:

Project 1 – OnBase Upgrade

Scope

Hyland will provide Professional Services to the Customer to upgrade OnBase version EP1 to the latest commercially available release.

Base Upgrade

The base upgrade services provided to the Customer will consist of the following items:

Project initiation

1. Project kick-off and planning activities; and
2. Project Plan.

Technical Planning

1. Infrastructure evaluation to aid with environmental planning. Consultants will review the current infrastructure and general setup or configuration of Software in order to provide recommendations on changes and/or confirmation of infrastructure plans;
2. Review software requirements and prerequisites specific to server and client side setup; and
3. Hyland will provide technical specifications documentation for the Hyland software infrastructure (Technical Architecture Diagram).

Environmental Setup and Upgrade

1. Upgrade two (2) Environments;
2. Upgrade Delivery Plan will be delivered to customer; and
3. Technical Consultant will complete basic software testing to validate general functionality following the upgrade (e.g. user login, client side software installation, core module functionality, general retrieval and archival).

User Testing

1. Ad-hoc consultation following the initial upgrade; and
2. Please review the Add-on Service table for any additional support included in scope.

Production Cut Over

1. Hyland and the Customer will agree on a mutually decided date and time to begin the production cutover;
2. Customer is responsible for notifying users of the system outage, as services and scheduled tasks will be stopped prior to beginning the cutover;
3. Technical Consultant will complete and provide the customer a Cut Over Plan;
4. One (1) day for execution of Production cut over;
5. One (1) day dedicated Go Live assistance immediately following production upgrade;
6. Please review the Add-on Service table for any additional support included in scope; and

7. Any open issues after the dedicated post upgrade assistance will be submitted to the Hyland Support team. Should any issues require Professional Services, a change request may be required.

Project Closure Activities

1. Provision of any final recommendations and/or identification of next steps as appropriate; and
2. Hand-off to Hyland Technical Support.

Solution Review and Recommendation Session

Hyland will perform a one (1) day assessment of the Customers Solution in order to identify opportunities for solution improvements and business process efficiencies. A Hyland Technical Consultant will perform one (1) continuous day of remote work along with one (1) day of documentation and follow-up meetings. The points below outline some of the topics that will be reviewed during the Solution Review and Recommendation Session.

1. Identify and document pain points and any outstanding issues with the current configuration, including functionality not currently included;
2. Review Capture Profiles, including Capture Profile distribution. This may include paper scanning, printing from file or capture from file locations;
3. Review all non-scanning incoming methods;
4. These hours must be utilized within 30 days of project go live;
5. Review any solution automation points and provide recommendations as needed;
6. Identify and document business process pain points and any outstanding issues, including functionality not currently included in the Hyland process;
7. Provide recommendations for Workflow/WorkView configuration;
8. Identify and document pain points around the current Hyland configuration;
9. Document all critical design options, recommendations and decisions for future reference and context; and
10. Provide a Solution Review Report:
 - A. Hyland will provide a Solution Review Report outlining all findings and recommendations made during the engagement;
 - B. Provide recommendations to enhance the solution in terms of functionality and efficiency;
 - C. Provide recommendations for releases and configuration changes; and
 - D. Review the findings and recommendations with the customer.

Post Upgrade - On Demand Services

Hyland will provide eight (8) hours of On Demand Services to the Customer. These hours must be utilized within 30 days of project go live.

On Demand Services are meant to remotely assist Customer with project initiatives and overall Software solution maintenance. Depending on the nature of any given request, Hyland's involvement may range from consultation only, to owning specific tasks. The points below outline common usage of On Demand Services.

1. Software installation, environmental setup, or migrations;
2. Advanced solution troubleshooting;
3. Infrastructure and performance discussions;

4. Solution enhancements or configuration changes;
5. Solution expansion or strategic planning;
6. Project assistance, guidance, or go live support;
7. Business process discussions or requirements review;
8. Integration or script review and consultation;
9. Software training and mentoring to administrators;
10. Regular Software administrative tasks or solution monitoring;
11. Support to Customer Administrator or help desk team;
12. Solution and/or performance assessments and optimization;
13. Technical assessments;
14. Database tune-ups;
15. Delivery of quarterly metrics;
16. Creating or reviewing user or administration guides; and
17. Solution testing and/or testing support.

Premium Subscription

In addition to the Services described in this contract, Hyland will provide the Customer with Premium Subscription. These licenses will be valid for six (6) months from contract execution date.

Project Team & Project Coordination

The Hyland project team will consist of one (1) or more consultants to support technical activities, as well as a primary Project Coordinator. Project coordination shall include intermediate project management, which includes:

1. Bi-weekly Project Status Report delivery;
2. Bi-weekly project conference call participation;
3. Centralized resource coordination and project oversight; and
4. Management of standard project plan (task, timeline, and resources), specific to task owned by Hyland.

Optional Add-on Services

The below table represents additional add-on options reviewed with Customer. Those marked with a "Y" reflect Services which have been included within the scope, those with an "N" are excluded. Should Customer's Service needs change after contract execution, ultimately requiring the inclusion of any add-on Services, a Change Order can be put in place to address those changes.

Add-on Service	Included
Location	
Three (3) days of onsite time, per resource. (Plus T&E)	N
Outside Hours	
(1) dedicated day (eight (8) continuous hours) of off hours Production Cutover	N
Support Services	
Phased or incremental production upgrade steps required. Price per production upgrade phase, which includes one (1) day of post upgrade dedicated support.	Y
Creating and/or upgrading one (1) additional environments, pre or post upgrade.	N
One (1) additional day(s) of ad-hoc support over a one (1) week period	N
Environment	
Current version of one or more of the products being upgraded is greater than three (3) versions behind	N
Upgrade will be performed in place within the existing environment	N
Disaster Recovery / High Availability Environmental Support (e.g. existing Load Balancers, mirroring, fail-overs, etc.)	N
Basic installation, setup, testing of an additional module.	N
SSO Consulting	N
Certificate Consulting	N

Assumptions

This project is based upon the below assumptions being true. If for some reason these assumptions prove to be false, this could result in a scope change and may have an impact on the proposed cost and timeline to deliver:

1. The purpose of this engagement is to create an upgraded environment that provides the same functionality that is in the Customers current production environment. In the event this is not possible Hyland will provide best practice recommendations on any required solution re-designs which may be necessary due to these changes, but the Customer is responsible for all solution design and/or configuration changes. In the event Hyland is required to perform these changes then a Change Order can be provided;
2. Hyland will perform a review of the Hyland created forms, custom reports, and scripts currently deployed in the Customers production environment to ensure compatibility with the upgraded version of Software. If additional work is required to update, then a change order may be required;
3. Agents/Modules/Components the Customer may currently be licensed for that have reached an end-of-life state will be reviewed during the Upgrade Planning process. Should a Software product (e.g. module, agent, component) be deprecated or reach end-of-life, services shall include the installation, setup, testing, and training on the new product. When software functionality, modules, or features are replaced with new functionality, the use and features of the new software may differ from the deprecated or end of life product;
4. The following modules within the Customer environment have reached end-of-life or are being deprecated with the following module and assumption
5. Customer will create and manage any necessary service accounts;
6. Customer is responsible for the backup and restore of data, such as the database and image repository;
7. Existing solution has a deployed Software platform version within three (3) versions of new version being deployed unless otherwise stated in the Add-Ons Services table above;
8. While production hardware may be upgraded, the overall infrastructure will not be changing in any way (e.g. no additional servers to be added, servers will reside within the same infrastructure environment);
9. Solution is on premise to Customer environment and is not hosted or maintained by a third party;
10. Standard Hyland response, not resolution, to any logged issue is two (2) business days or less;
11. Customer will own end to end solution testing;
12. Customer is responsible for User Testing including creation of test plans, formal documentation/solution guides and formal project management;
13. Customer is responsible for performing the Database and OSM copy/move to pre-production servers if needed;
14. The Solution Assessment will only include analysis and recommendations. The actual implementation of recommendations requires a new engagement and will be scoped out separately; and
15. Customer will provide the following resources for the Solution Review:
 - A. Hyland System / Solution Administrator; and
 - B. Business Owners of the solutions in scope.

Exclusions

The following items are considered out of scope for this engagement:

1. Modifications to Customer's Software solution as a result of the Software upgrade. This includes any custom scripts, workflows, API integrations, or other general configuration areas of Software, should Software solution require changes, following the testing phase. All solution changes will be the responsibility of Customer's Software system administrator(s);
2. The migration of the solution to new hardware;
3. Leveraging an existing non-production environment as the go-forward production environment;
4. Use of VB scripts within Customers OnBase environment;
5. Migration to a new data center / hosting provider;
6. The refresh of any non-production environment with current production data;
7. The creation of additional Software environments; and
8. Software upgrade will not include the implementation of Software modules not currently in use within Customer's environment.

Required Resources

Resource
Infrastructure Analyst
Integration Engineer/Custom Solution Consulting
Project Manager
Technical Consultant

For details about the required resources, please review Appendix 1.

Deliverables

Deliverable
Project Plan
Technical Architecture Diagram
Upgrade Plan
Solution Review Report

For details about the deliverables, please review Appendix 2.

KEY ASSUMPTIONS

The following are key assumptions that impact the success of the solution, and are applicable to all Project Areas within this Services Proposal:

1. Project start date(s) are subject to a mutually agreed upon schedule after execution of contract;
2. Professional Services will be delivered utilizing Hyland's standard implementation methodology;
3. Professional Services will be provided remotely from Hyland offices:
 - A. When providing remote services, Hyland and Customer will discuss generally acceptable working hours and take into consideration time zone differences. Issues deemed as non-critical will only be addressed during normal business hours.
4. Each project is intended to be implemented in a timeframe of contiguous weeks. Scheduling delays that impact the project timeline will result in changes to project costs;
5. Each deliverable created will use Hyland's standard deliverable templates. Customer requested changes to deliverable templates may increase project costs or introduce timeline delays; and
6. If necessary, after execution, this Services Proposal or corresponding agreement can be adjusted in scope, or a new agreement issued, following the Project Change Control Process.

CUSTOMER OBLIGATIONS

To facilitate Hyland's execution of the Professional Services, Customer agrees, at a minimum, to the following obligations. The parties acknowledge and agree that failure to meet the responsibilities noted will likely affect project duration, cost and/or quality in the execution and completion of Professional Services.

Project Personnel

1. Customer will assign a project sponsor, who will be actively involved in the project(s) and is the final escalation point for all issues and decisions:
 - A. The project sponsor will also ensure that the appropriate Customer personnel are assigned and made available to execute the project(s) successfully.
2. Customer will assign a project manager, who will act as a single point of contact for the Hyland project team and whose responsibilities include, but are not limited to, the following:
 - A. Managing all customer obligations as defined within this Services Proposal; and
 - B. Coordinating all key departmental decision makers, technical experts, subject matter experts, end user representatives, third party software application resources and project sponsorship.
3. Customer will designate a Software administrator who will undergo any applicable Software training recommended in order to participate actively throughout the project(s) and support all Software environments and solutions:
 - A. Software training course(s) (if recommended) are provided separately from this Services Proposal by the Hyland Account Manager.
4. Customer will engage the appropriate business process owners to the project(s), as well as subject matter experts, who are thoroughly knowledgeable about the current business practices in their respective areas and who are capable of performing their assigned project roles:
 - A. Business process owners and subject matter experts will be required to attend and contribute to all project meetings to which they have been invited for the duration of the project(s).
5. Customer will provide Information Services (IS)/Information Technology (IT) representative(s) to assist with the Software installation with regard to network and system administration;
6. Customer will provide trained technical team member(s) to assist in supporting and maintaining all aspects of the hardware, network, and/or database maintenance plans throughout the project(s);
7. Customer will provide vendor resources, interface specialists, technical experts, and/or subject matter experts deemed necessary for third party system(s) with which Software will integrate or from which content will be migrated; and
8. Customer will make reasonable efforts to maintain consistent resources throughout the project(s):
 - A. Any anticipated changes to the core team must be communicated in writing within five (5) business days; and
 - B. If the change is due to illness or termination of the core team member, the change must be communicated as soon as possible.

Project Management

1. Customer will review the remaining work effort with the Hyland project team throughout the project(s). If, at any time, the number of hours required to complete a project phase exceeds the number of hours estimated by the project teams for that phase, then Hyland will incorporate the Project Change Control Process prior to exceeding the budgeted number of hours;
2. Customer will review all deliverables in accordance to the agreed upon plan. Failure to respond where needed within the designated timelines may result in project delays, loss of resources, and incorporation of the Project Change Control Process;
3. Customer will execute timely decision-making, completion of all deliverables and action items and resolution of issues throughout the course of the project(s); and
4. Customer will arrange for physical workspace and tools (work desks, networked computers, meeting rooms, training rooms, conference phones, whiteboards, etc.) for duration of the project(s) to accommodate scheduled onsite and/or remote activities as dictated by Customer's reasonable security measures.

Software Installation, Access, Integrations and Deployment

1. Customer will ensure all hardware is in place and made ready as dictated by the implementation schedule. This includes full, independent access to all environments in which Hyland is required to work including environments required for migrations or integrations, or multiple development, testing and production environments for Software:
 - A. Local and remote VPN access must be provided to applicable Hyland resources through the use of dedicated user account(s) with appropriate privileges to the Software and/or relevant third party applications; and
 - B. Access must be provided prior to Hyland's arrival at Customer facilities and/or project discovery sessions.
2. Customer will provide a properly setup environment in accordance with Hyland's prerequisites. Setup will consist of the installation, configuration and administration of, but not limited to, all hardware and operating systems, database instance(s), networking and required third party software;
3. Customer will have at least one (1) non-production Software environment for installation and deployment;
4. Customer will provide proper setup of networking and required third party software environment(s) in accordance with Hyland's prerequisites;
5. Customer will provide all necessary components including, but not limited to, power, lighting, network connections/rights and environmental controls deemed necessary for the proper functioning of and access to the system;
6. Customer will manage setup, execution, and validation of database maintenance plan(s) for each Software instance;
7. Customer will perform routine, scheduled backups and maintain disaster recovery and contingency plans for each Software instance;
8. Customer will manage third party application setup (i.e. installation, configuration), testing, training, and go-live support related to integration(s) with Software;
9. Customer will package and deploy all Software clients, unless otherwise defined within this Services Proposal; and
10. Customer will deploy all supporting Software client hardware (e.g. scanner, signature device) and related third party software (e.g. drivers, licenses) required for the Software solution.

Testing/Training

1. Customer will manage the deployment of Software testing/training workstation(s) (e.g. PC and scanner) including the installation of all necessary software/clients, unless otherwise defined within this Services Proposal;
2. Customer will prepare and supply the necessary testing/training resources including, but not limited to, the following:
 - A. Sample, production-like, content;
 - B. Electronic feeds; and
 - C. Paper documents.
3. Customer will secure training room(s) ensuring that all resources participating will have the proper workstations and materials, as set forth by the Hyland project team:
 - A. If these provisions are not met, Hyland has the right to cancel and reschedule training.
4. Customer will create, maintain, and execute test plans and cases, as well as track and report testing results during the testing cycle(s); and
5. Customer will train additional end users on the use of the Software.

PROJECT CHANGE CONTROL PROCESS

Requested changes to this Services Proposal will be managed using the Project Change Control Process outlined below.

If any party believes that a change to this Services Proposal is warranted, the party shall issue a Change Request in writing. The Hyland and Customer project teams will review the Change Request, determine the impact and attempt to agree to the change(s). Once the change(s) are agreed upon, Hyland will provide a formal Change Order to Customer outlining the change in Professional Services, the impact on hours, resources, timeline and/or cost.

Customer and Hyland will fully execute each mutually agreed upon Change Order prior to the requested changes taking effect. Customer and Hyland acknowledge that this may affect Professional Services, timelines and deliverables, and therefore will make reasonable efforts to execute any changes to this Services Proposal with enough lead-time to minimize the influence on the project. No Change Order is binding upon the parties until it is executed by both Customer and Hyland.

PRICING

Customer acknowledges that the Professional Services pricing is based solely on the information provided to Hyland and referenced in the above Project Areas.

Time and Materials Projects

Project	Work Hours	Totals (USD)
Project 1 – OnBase Upgrade	107	\$26,950.00
Total	107	\$26,950.00

Resource	Standard Hourly Rate
Advanced Capture Consultant	\$250.00
Business Consultant	\$250.00
Conversion Consultant	\$300.00
Database Engineer	\$300.00
Enterprise Solutions Consultant	\$250.00
Infrastructure Analyst	\$300.00
Integration Engineer/Custom Solution Consulting	\$250.00
Principal Consultant	\$300.00
Program Manager	\$300.00
Project Manager	\$250.00
Solution Architect	\$300.00
Technical Consultant	\$250.00

Pricing Assumptions

The pricing was created using the following assumptions:

1. The above pricing includes estimated Professional Services fees anticipated to complete the project(s) successfully;
2. Travel expenses are not included in this Services Proposal and will be charged separately as incurred by Hyland resources;
3. The time and materials estimate(s) provided to complete the Professional Services are provided for convenience only and are an approximation of the anticipated amount of fees needed to complete such Professional Services. Customer will be invoiced monthly based on the amount of time actually required to complete such Professional Services and the applicable hourly fees; and
4. Any additional Professional Services requested of Hyland resources in alignment to this Services Proposal, which have been facilitated by the Project Change Control Process, will be charged at the then current standard Hyland resource rates.

After-Hours Support

1. After-hours or weekend support will be made available for this project:
 - A. After Hours shall be defined as after normal business hours of 8am to 5pm local time, Monday through Friday not including observed national holidays;
 - B. Weekend Support shall be defined as 8am to 5pm local time, Saturday and Sunday or observed national holidays;
 - C. A maximum of eight (8) hours per resource, per shift, with a rest period of eight (8) hours rest between each engagement; and
 - D. All After Hours work is billed at time and a half (1.5 x bill rate).

SIGNATURES

City of Huntsville

By:

Name: Tommy Battle

Title: Mayor

Date: October 27, 2022

Hyland Software Inc.

By:

Name: (Print)

Title:

Date:

Purchase Order #: _____

(Invoices issued hereunder may not reflect a PO number if this field is not completed)

APPENDIX 1 – RESOURCE DESCRIPTIONS

The following table provides an overview of the Hyland Global Services resource types and their corresponding responsibilities.

Resource Type	Responsibilities
Advanced Capture Consultant	Provides expertise on capture solutions. Documents business process requirements, configures capture solutions to meet requirements, provides administrative training and train the trainer courses, migrates solutions to additional environments and provides user testing issue resolution and go-live support.
Business Consultant	Provides expertise on Workflow and Case Management solutions. Documents business process requirements, configures solutions to meet requirements, provides administrative training and train the trainer courses, migrates solutions to additional environments and provides user testing issue resolution and go-live support.
Conversion Consultant	Provides expertise on the conversion process. Drives conversations with Customer on best practices and ultimately assists in defining the conversion process to be utilized to meet Customer conversion requirements.
Database Engineer	Provides expertise related to the Software database. Makes recommendations on best practices, maintenance plans and disaster recovery considerations.
Enterprise Solutions Consultant	Provides long-term business and strategy planning, analysis, discovery and coaching to support business transformation with Customer's Software solution. Develops strategies analysis, coaching and recommendations based on Customer needs resulting from information assessments and change management efforts.
Infrastructure Analyst/ Solution Architect	Provides consulting on the initial setup or review of hardware infrastructure impacting the Software solution. Drives conversations with Customer technical teams focusing on the network, server, database, and storage level of the Software solution as well as reviews integration components that may affect overall performance.
Integration Engineer / Custom Solution Consulting	Provides expertise on integrations and API development. Supports and mentors Customer on the creation of web service integrations. Develops custom scripts and pre- and post-processors within Software to meet specialized Customer needs. Documents business requirements, develops solutions to meet requirements, provides administrative training and train the trainer courses, migrates solutions to additional environments and provides user testing issue resolution and go-live support.
Principal Consultant	Provides deep Software expertise to advise Hyland and Customer implementation teams on best practices throughout an engagement. Guides discovery sessions and takes technical ownership of solution requirements and design.
Program Manager	Establishes relationships with key stakeholders to regularly examine business needs against Customer's vision, strategies and goals. Focuses on managing and optimizing Hyland project resources to minimize resource rotation. Develops metrics and reports regularly on steady state solutions and in-flight projects, assuring delivery of desired business value. Provides a single point of focus for all escalations.

Project Manager	Provides project coordination expertise and is the initial point of escalation for the project.
Provides supervisory project services to facilitate scheduling of the Hyland project team, coordinates periodic status meetings, and communicates the project budget.	
Technical Consultant	Provides expertise on Software installation and module configuration.
Documents business requirements, installs and configures solutions to meet requirements, provides administrative training and train the trainer courses, migrates solutions to additional environments and provides user testing issue resolution and go-live support.	

APPENDIX 2 – DELIVERABLE DESCRIPTIONS

The following table provides an overview of the Hyland project deliverables. Please reference the specific Project Areas for a listing of the applicable deliverables.

Deliverable	Description
Project Charter	Provides a preliminary delineation of roles and responsibilities, outlines project objectives, identifies key stakeholders and defines the authority of the project charter.
Delivered within the initiation phase.	
Includes the agreed upon scope, objectives and participants in the project.	
Upgrade Plan	Defines the projected schedule of the upgrade including all events from beginning to end of the upgrade.
Delivered within the initiation/discovery phase and updated throughout the project.	
Includes the activities, deliverables, assignments and dates required to complete the upgrade.	
Technical Architecture Diagram	Outlines recommended architecture and sizing specifications for servers (physical and virtual), storage considerations and integration points with external Customer applications.
Documents recommendations for production, test, staging/User Testing (UT), disaster recovery and development environments.	
Documents recommendations based on Customer throughput and access requirements.	
Solution Review Report	Provides an overview of the customers Solution.
Provide recommendations to enhance the solution in terms of functionality and efficiency.	
Provide recommendations for releases and configuration changes.	
Review the findings and recommendations with the customer.	

*** END OF DOCUMENT ***