IMPLEMENTATION

Project Implementation Methodology (PIM)

Hyland utilizes a solution design philosophy that ensures all business and technical requirements and constraints are mutually identified and easily understood by Hyland and our customers.

We embrace a project methodology that enables us to design and deliver our solutions using a proven, standard and repeatable method. It was developed from experience gained implementing successful solutions across multiple vertical segments. The methodology represents best practices for guiding implementations and allows for:

- Maximum resource utilization
- Effective budget control
- Achieving project quality metrics
- Equipping the customer to be confident and competent solution owners

Organized as a structured, multi-phased approach, your organization can choose to utilize the entire methodology or to select portions of the methodology to integrate with your own methodology. The methodology was designed to assist our customers in achieving their goals with respect to strategic planning, management and deployment related to project implementation.

> To ensure a successful project implementation, Hyland utilizes a Project Implementation Methodology.

760+
Global Service Employees

2,600+
Successful projects delivered annually

30+ years
in the content services industry, leading customers to success
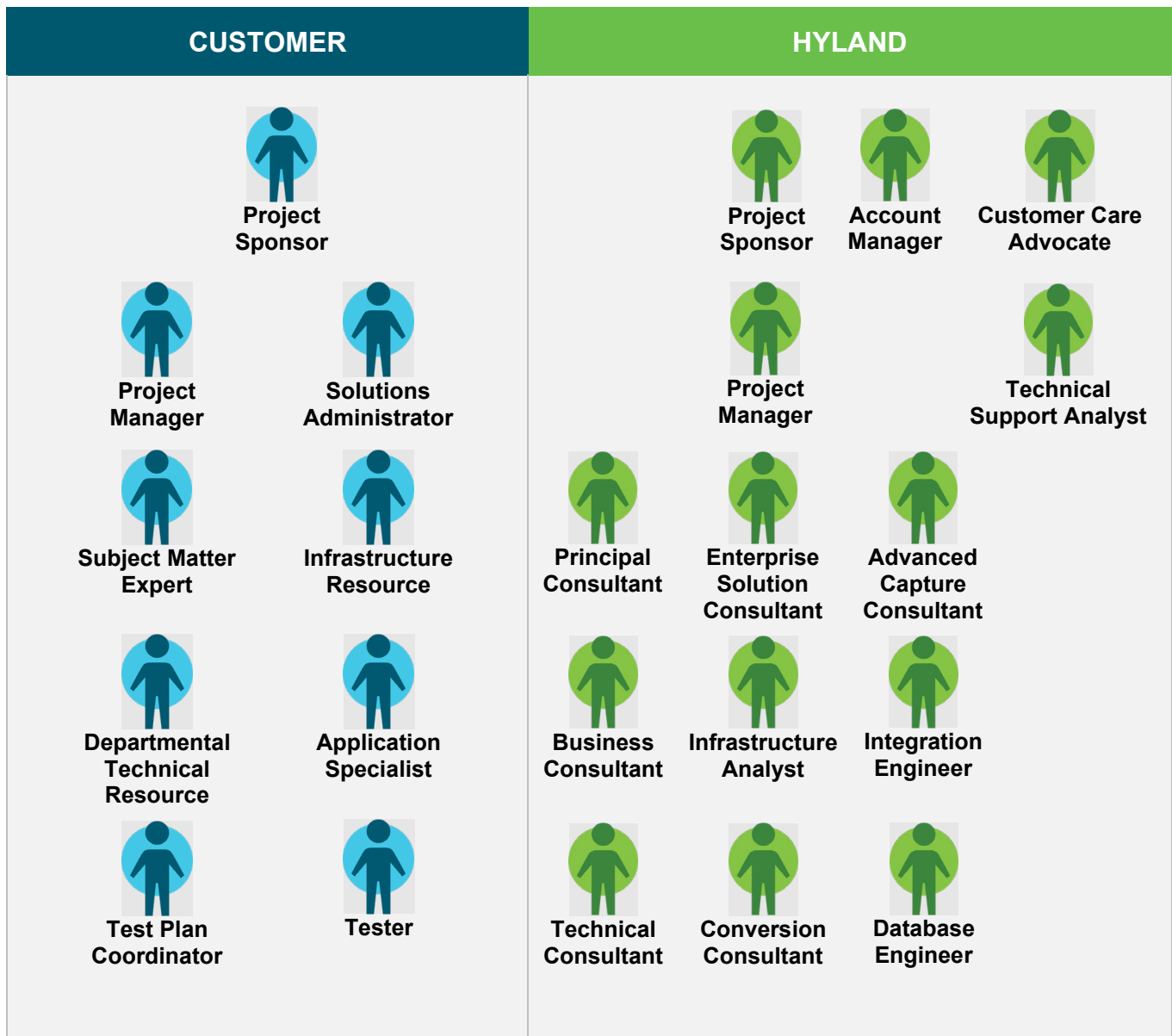
Hyland delivers solutions on time and within budget.

Hyland

Implementation Phases

PHASE	HYLAND	CUSTOMER
Initiation	- Signed contract - Transition engagement from sales to services - Project planning - Project charter	- Project planning - Refine requirements - Organizational change management process - Project charter approval
Discovery	- Kick off project - Requirements capture - Requirements analysis - Requirements sign-off - Requirements document	- Undivided attention - Subject matter expertise - Example documents - Supporting documents - Final decisions - Requirements sign-off
Implementation	- Solution design - Configuration of the solution - Prototype reviews - Design revisions - Hyland testing	- Provide network access - Write test cases - Provide feedback - Control scope - Respond quickly - Learn solution fundamentals
Training & Testing	- Training guides - Train the Trainer - Administrator training - Support customer testing - Solution sign-off	- Committed time to test - Execution of test cases - Issue reporting - Training environment prepared - Solution sign-off
Go Live	- Solution migration - Production verification - Production use - Production support - Transition to support	- Production use - Production verification - Administrative support
Closure	- Customer Success - Plan for outstanding items - Lessons learned - Solution expansion opportunities	- Ownership - Plan for outstanding items - Solution expansion roadmap

Hyland

Organization

The sample high-level organization chart below lists the typical roles engaged during a Hyland solution implementation. Depending on your organization and project structure, an additional level of project sponsorship and steering committee may be involved as well.

To ensure a successful implementation, the project team is carefully configured to fit the needs of your organization.

CUSTOMER	HYLAND
Project Sponsor	Project Sponsor — Account Manager — Customer Care Advocate
Project Manager — Solutions Administrator	Project Manager — Technical Support Analyst
Subject Matter Expert — Infrastructure Resource	Principal Consultant — Enterprise Solution Consultant — Advanced Capture Consultant
Departmental Technical Resource — Application Specialist	Business Consultant — Infrastructure Analyst — Integration Engineer
Test Plan Coordinator — Tester	Technical Consultant — Conversion Consultant — Database Engineer

Note: Only required resources meeting your project requirements will be engaged.

Hyland®

Customer Project Team

To successfully implement a Hyland solution, your organization should be prepared to make the following resource roles or services available to the project.

ROLE	DESCRIPTION	ACTIVITIES
Project Sponsor	Provides high-level oversight and guidance for the project	▪ Reviews milestones ▪ Conducts/attends status meetings on occasion ▪ Approves major change requests ▪ Manages funding and budget issues
Project Manager	Manages the day-to-day activities of the project	▪ Coordinates business and technical resources ▪ Ensures that Hyland requests are promptly responded to ▪ Verifies that discovery and documentation appropriately captures business requirements ▪ Reviews budget and project plan on a regular basis
Solution Administrator	Administrator of the Hyland solution and supporting system	▪ Attends Hyland-hosted training prior to the end of implementation phase ▪ Actively involved during implementation and testing ▪ Coordinates training of end-users ▪ Makes modifications to solution as appropriate ▪ Provides support to end-users ▪ Main technical contact with Hyland Technical Support
Subject Matter Experts (SME)	Provides ongoing business expertise and insight into business processes and current structure	▪ Defines functional requirements and scope of solution ▪ Participates in Discovery sessions ▪ Provides input into solution acceptance ▪ Attends internal training sessions ▪ Takes an active role in end-user testing

Hyland®

ROLE	DESCRIPTION	ACTIVITIES
Infrastructure Resource	Main point of contact for all Infrastructure issues.	• Ensures that hardware and software is ordered and configured with appropriate pre-requisites • Designates appropriate support people for network, database, security related to the Hyland solution • Provides VPN remote access for Hyland team • Performs regular monitoring of solution from a technical perspective
Departmental Technical Resource	Main point of contact for all departmental hardware and client software deployment.	• Configures scanners and other hardware • Ensures that pre-requisites and client software is deployed to all workstations
Application Specialist(s)	Provides day-to-day technical support of line of business systems.	• Works with Hyland team to determine integration points with the Hyland solution
Test Plan Coordinator	Principal resource for generating Test Plans	• Creates test plans beginning at the end of discovery • Ensures test plans are available for the beginning of user testing
Tester	Responsible for testing of the configured solution	• Executes test plans generated by the test plan coordinator • Dedicates significant time to the testing effort and is allocated by management

Hyland®

Hyland Project Team

Hyland will deploy the necessary professional services resources to properly staff the project. These resources are specifically trained in key functional areas and provide a level of domain expertise across the project lifecycle.

Note: Not all resources listed below may be required for your specific project.

ROLE	DESCRIPTION	ACTIVITIES
Advanced Capture Consultant	**Vertically aligned** Provides documenting of business process requirements.	- Validates a right fit solution - Configures the capture solution to meet the documented requirements - Provides administrative training - Train the trainer courses - Migration to additional environments - User testing issue resolution - Go-live support.
Business Consultant	**Vertically aligned** Performs the analysis, design, integration and implementation of the business process at the customer site(s).	- Conducts business process discovery sessions - Documents process functional requirements - Implements and tests the solution - Trains your organization's System Administrator - Provides support to your organization during end-user testing - Creates Administration Guide - Provides Go Live support
Conversion Consultant	**Technical services** Provides best practices, proven methodologies and insight to support conversion tasks. Mentors customer team.	- Provides consulting and education to customer's qualified resources - Jump-starts the customer's conversion project - Provides the critical knowledge necessary for a successful conversion
Database Engineer	**Technical services** Develops processes that require direct interaction with the underlying solution database.	- Manages conversion of content from 3rd party ECM platforms to Hyland solution - Assists in migrating or consolidating solutions to new database platforms - Performs one-time specific software tasks directly within the solution database

Hyland

ROLE	DESCRIPTION	ACTIVITIES
Enterprise Solution Consultant	**Enterprise planning services** Provides long-term business plans and analysis to expand and support Customer's Software solution.	▪ Develops strategies and implements recommendations based on Customer needs ▪ Acts as a program manager over/supervising individual projects within an organization ▪ Ensures customer remains educated on Software capabilities and additional opportunities.
Infrastructure Analyst	**Technical services** Provides consulting and recommendations related to solution infrastructure.	▪ Facilitates infrastructure discussion ▪ Reviews solution requirement to help calculate general hardware and storage requirements ▪ Supports follow-on conversations regarding hardware and software technologies
Integration Engineer	**Technical services** Provides integrated solutions within software that cannot be delivered using standard functionality.	▪ Reviews functional specifications delivered by Hyland personnel ▪ Creates technical solution design Implements solution
Principal Consultant	**Vertically aligned** Provides deep Software expertise to advise Hyland and Customer implementation teams on best practices throughout the engagement.	▪ Guides the requirements gathering sessions ▪ Takes technical ownership of solution requirements and design
Project Manager (PM)	**Vertically aligned** Responsible for project implementation managing day-to-day project activities	▪ Prepares status reports ▪ Coordinates Hyland resources ▪ Manages issue tracking and resolution ▪ Facilitates change management ▪ Assists in capturing functional requirements and documenting the final solution

Hyland

ROLE	DESCRIPTION	ACTIVITIES
Technical Consultant	**Vertically aligned** Installs and configures the solution software at the customer site(s)	• Conducts discovery sessions to prepare for solution implementation • Implements and tests the solution • Trains System Administrator • Creates Administration guide • Provides Go Live support
Customer Care Advocate	**Technical support services**	• Guide and advocate through the product support processes • Regular case monitoring to identify high impact issue trends • Act to manage high priority issues quickly and effectively • Provide cross-team coordination to resolve issues
Technical Support Analyst	**Technical support services** A hand off occurs at the conclusion of "go live" transitioning from Global Services to Technical Support for on-going support of the Hyland solution.	• First point of contact regarding software issues • Assists customer with issue reporting and resolution

Hyland®

Sample Timeline

High-Level Timeline / Project Plan

Task Name
1 Hyland Project Methodology
1.1 Initiation
1.1.1 Setup & Preparation
1.1.2 Final Planning
1.2 Discovery
1.2.1 Analysis
1.2.2 Documentation
1.2.3 Approval
1.3 Implementation
1.3.1 Design
1.3.2 Design Review
1.3.3 Build
1.4 Testing & Training
1.4.1 User Training
1.4.2 System Testing
1.4.3 Verification of Testing
1.5 Go Live
1.5.1 Planning and Preparation
1.5.2 Execution
1.6 Closure

|

Hyland