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# PROFESSIONAL SERVICES PROPOSAL

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The City of Pembroke  
Pines, FL

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Document Version: 3

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Document Date: 12 Apr 2022

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

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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 The City of Pembroke Pines, FL 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.

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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 The City of Pembroke Pines, FL ("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.

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 – Services for Migration to Hyland GCS Hosted Environment

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#### Scope

Hyland will provide Professional Services to Customer related to the migration of Customer's current Software environments, solutions, and corresponding content to the Hyland Global Cloud Service (GCS) hosted environment, including:

1. The following environments:
  - A. Test; and
  - B. Production.
2. Support for an upgrade of the following Hyland products:
  - A. OnBase (Version 17)

The project will begin with a migration workshop where Hyland will review the Customers existing environment and create a plan to upgrade/migrate to the Hyland Cloud. Once the workshop is completed, Hyland will build the hosted production environment. As part of the implementation phase, Hyland will make the necessary changes to the Software to properly operate in the hosted environment. Areas of focus for changes as devices in this Professional Services proposal shall be limited to environmental-related connections, products/modules configuration, functionality, and integrations which require changes due to a move from a premise-based solution to the GCS hosted environment.

Upon the completion of installation/upgrade, migration/changes, and testing/validation by Hyland within the initial Software environment, User Testing (UT) by the Customer may begin. Hyland will provide testing support during this time. Upon completion of the testing period for the initial environment, Hyland will work with Customer to finalize the production cutover/go-live plan and responsibilities.

The cutover/go-live phase will include the migration of delta content, as well as a production database backup. Once the restoration of all data is complete and all necessary configuration changes are made, Hyland will provide support as Customer performs final testing and validation tasks. Upon completion of final testing, Customer will go live in the hosted environment. Following go-live support, Hyland will provide a period of stabilization support. Support will include weekly calls to discuss open issues or concerns, and coordination with Customer to address any mutually agreed upon changes or updates.

See below for a recap of the general project activities:

1. Project initiation and kick-off;
2. Migration workshop including discovery sessions for environmental/solution review, gathering of requirements for the hosted environments and any solution changes, and drafting of the migration plan;
3. Creation of documentation and review of the materials with Customer in order to obtain mutual agreement prior to implementation;
4. Migration of initial data (e.g. database and file storage documents);
5. Implementation of Hyland hosted environment(s):
  - A. Environment build and solution configuration;
  - B. Security and authentication;
  - C. Functional testing;

- D. Deployment testing; and
- E. Administrative training.
- 6. User Testing (UT) support;
- 7. Migration of delta data;
- 8. Production cut-over and go live support;
- 9. Solution stabilization support.

The services will include the following changes/updates and related activities:

- 1. General/environmental (either directly by Services or in support of GCS efforts):
  - A. Directory paths for content storage (i.e., disk groups, OSMs);
  - B. Processing paths for modules or other means to access data;
  - C. Paths, URL's, data sources, etc. within script configuration of Software;
  - D. File location references within electronic/HTML forms;
  - E. Re/configuration of scheduled tasks or timers;
  - F. Module reconfigurations as necessary;
    - I. Ad-hoc Scanning;
    - II. Application Enabler;
    - III. Directory Import Processor;
    - IV. Document Import Processor;
    - V. EDM Services;
    - VI. Full-Text Indexing Server for Autonomy IDOL;
    - VII. Full-Text Search;
    - VIII. Production Document Imaging (TWAIN);
    - IX. PDF Framework; and
    - X. Virtual Print Driver
  - G. Review of current solution to include the following:
    - I. Import processes to include:
      - A. Eight (8) Autofill Keyword Set;
      - B. Forty-nine (49) Document Import Processes (DIP); and
      - C. Two (2) Scan Queues.
    - I. Eight (8) Internal Autofill Keyword Sets;
    - II. Nine (9) Scheduled Processes; and
    - III. Eleven (11) Standard Custom Queries.
  - H. Encryption of disk groups and keywords;
  - I. User security and authentication with Hyland IdP or 3rd party SSO; and
  - J. Security administration.
- 2. Custom Solution Changes:
  - A. None.
- 3. New products:
  - A. Full-Text Search (in replacement of Autonomy IDOL):
    - I. Migrate the existing Autonomy IDOL catalogs to Full-Text Search catalogs; and
    - II. System administrator training on the general configuration and use of Full-Text Search.

## 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:

### Project/Services Assumptions

1. Hyland will utilize a copy of the production environment to create the non-production environment(s);
2. Customer understands a “freeze” to configuration changes will be necessary once the migration project begins, aside from any changes deemed critical to the ongoing use of the on premise production solution;
3. A migration checklist will be utilized to track activities and the respective responsible parties. The checklist will be created as a result of discovery sessions and the initial migration, and updated as necessary for use during the migration of subsequent environments;
4. Hyland GCS will create the hosted environments (including any installation/upgrade work) and migrate the solutions as is, updating the environmental-related connections and configurations with the help of Hyland Professional Services as necessary;
5. Hyland Professional Services will provide general support for the migration, the changes or configuration specified in scope, and general solution testing/validation;
6. Hyland Professional Services support for Customer User Testing (UT) will not exceed a period of two (2) weeks for each environment;
7. Changes requested for an environment after the testing period has been completed may require additional time/budget and a Change Order;
8. Project cutover and go live will each be a one (1) time event;;
9. Hyland Professional Services support for Customer go-live will not exceed a period of one (1) week;
10. Following go-live support, Hyland Professional Services will provide stabilization support over a period of four (4) weeks; and
11. Following stabilization support, the project will be closed and support for the solution will be transitioned from the Professional Services team to the Hyland Technical Support team. Customer may then report issues through the standard Technical Support procedures.

### Solution Assumptions

1. Customer is currently or will be using Microsoft SQL Server as the database platform at the time of project engagement;
2. Customer’s solution will be upgraded to the latest commercially available version of the Software as part of the migration activities performed by Hyland GCS;
3. Customer solution has following items that are no longer in use:
  - A. Nine (9) workflows.
4. Any inconsistencies found within the database during upgrade/migration that require resolution may necessitate a Change Order;
5. Customer understands that some aspects of how the solution works, integrates with third party systems, or internal business processes and procedures may need to change as a result of moving from an on premise to hosted environment;
6. Customer understands that any direct database connections, lookups or integrations will need to be modified as these will not be possible within the hosted environment;
7. Software products (e.g., modules, agents, components) the Customer may currently be licensed for that have reached an end-of-life state will also be reviewed during the migration workshop. Should a product be deprecated or at end-of-life, services shall include the installation, setup, testing, and training on the new product as specified in scope:

- A. Customer may be required to purchase replacement Software products in order for installation services to be provided;
  - B. Customer understands that when products are replaced, the use, functionality, and features of the new products may differ from deprecated or end of life products; and
  - C. Hyland will provide best practice recommendations on any required solution re-designs which may be necessary due to products changes. Customer is responsible for all solution design and/or configuration changes related to new products.
8. The following products within the Customer environment are currently known to have reached end-of-life or been (or will be) deprecated:
- A. Full-Text Indexing for Autonomy IDOL
9. Customer's solution does not or will not include any of the following, post-migration:
- A. Direct database connections to third party systems;
  - B. Direct access to the database for the purposes of reporting or other needs;
  - C. Database customizations;
  - D. Custom development;
  - E. Custom scripts;
  - F. Custom integrations;
  - G. Reporting solutions; and
  - H. Deprecated products.
10. All referenced URLs called by the Software within the hosted environments must be exposed and secured with SSL;
11. Any import files needed for the solution will be transferred to the hosted environments via an incoming SFTP location;
12. Any export files produced by the solution will be placed by Software to an outgoing SFTP location; and
13. Hyland will work with the Customer to configure User Replication Agent within the hosted environment(s). Customer understands they will be required to open their LDAP/LDAPS to a specified range of IP Addresses in order to utilize User Replication Agent for User/Group synchronization within Software.

## Customer Responsibilities

To facilitate Hyland's execution of the Professional Services, Customer agrees, at a minimum, to the following migration-specific 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.

- 1. Make available solution administrator and business process experts that will ensure all components of the existing on-premise solution are identified during the migration workshop;
- 2. Deliver all databases, disk groups/OSMs, and other requested files/folders (e.g. HTML forms or files, web.config files, inserver directories, etc.) by the agreed-upon dates during each migration/testing phase and production cut-over in order to maintain the project timeline:
  - A. Each database backup should be:
    - I. Taken just following the disk group promote so that the database backup matches the disk groups; and
    - II. Provided in Microsoft SQL Server.
  - B. Each backup will be restored in the hosted environment to create the hosted solutions; and
  - C. All files should be clean, virus free, and organized in the same way they exist in the on premise environment, meaning that they should retain their folder structure.

3. If using a copy of production to create non-production environment(s), promote any necessary configuration or development from the on-premise non-production environment(s) to the on premise production environment prior to the engagement, or it will be unavailable in the hosted solution;
4. If using full-text indexing, identify the existing full-text catalog as part of the content migration;
5. Provide all content via SFTP or a Hyland-provided NAS device:
  - A. If a NAS device is necessary, Customer is required to connect the device within their network; and
  - B. Regardless of method, Customer understands Hyland will need the necessary access to any data being migrated and will assist in the process of setup and copy of data.
6. Supply any local on-premise hardware required for the project (i.e. HL7 Message Engine Server);
7. Install, configure, troubleshoot, and maintain any third party SSO, including both the Service Provider and Identity Provider;
8. Implement any required changes to third party systems with which the Software integrates;
9. Implement any required changes to solutions as a result of deprecated Software products;
10. Expose and secure with SSL, any URLs required to be called by the Software;
11. Place regularly used solution import files in the provided incoming SFTP location for upload to Software (both during the migration and for ongoing use of the solution);
12. Retrieve regularly used export files from the provided outgoing SFTP location for upload to other systems or for other internal uses (both during the migration and for ongoing use of the solution);
13. Complete thorough User Testing (UT) including end-to-end testing and validation that all solutions are fully functioning as expected within the new environments (and upgraded version of the Software, if applicable). The following may require particular consideration:
  - A. Scanning, import, and capture methods;
  - B. Electronic forms;
  - C. All business functions and exceptions;
  - D. Any re-configured or re-designed solution components (e.g., integrations);
  - E. New modules (if implemented); and
  - F. Security/access.
14. Upon the production cut-over:
  - A. Coordinate a mutually agreeable shutdown date and time of the on premise production environment and notify users of the system downtime;
  - B. Stop all work in the on premise production environment to ensure transactions are not missed in the hosted environment;
  - C. Should on premise changes or work be critical, first discuss them with Hyland, and then document and communicate all changes made; and
  - D. After full shutdown, perform a full backup and provide (typically via SFTP) a final production database backup and copy of the last promoted delta disk group volumes.
15. Deploy Software clients to end users:
  - A. Hyland will work with Customer to determine the best method for Customer to distribute/upgrade Software client for end users; and
  - B. Hyland will support testing of deployment on an initial two (2) machines.
16. Create solution training guides/documentation; and
17. Deliver end user training as needed.



## Exclusions

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

1. Changes by Hyland to Customer's existing solution/design other than those listed in scope;
2. Data cleanup or database inconsistencies identified during the engagement that require resolution;
3. Implementation or support for the following:
  - A. More than one (1) upgrade from current version of Software;
  - B. Software solution updates related to newly available functionality in the upgraded version of the Software;
  - C. New Software solutions for the purposes of business processing or management;
  - D. New Software products other than those listed in scope;
  - E. Software updates to account for functionality of deprecated modules;
  - F. Solution updates to account for functionality of deprecated modules;
  - G. Custom scripting, development, or integrations;
  - H. Reporting functionality, including replacements to current reporting functionality:
    - I. A number of options exist to replace reporting functionality including new Software modules, Professional Services to create custom reports, or hosted offerings. If Customer or solution require new or different reporting functionality, additional discussion is required to identify and provide pricing for the desired option.
4. Solution training guides/documentation and end user training; and
5. Solution assessment or health check.

## Required Resources

Resources
Infrastructure Analyst
Project Manager
Technical Consultant

For details about required resources, please review Appendix 1. For rates, see Pricing.

## Deliverables

Deliverable
Project Charter
Project Plan
Project Status Report
Cloud Migration Strategy Document

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. Hyland Global Cloud Services (GCS) will provision and maintain the Software non-production and production environments required for the solution(s) within the primary Hyland GCS data center hosting the solution, in accordance with the terms of the current Master Software License, Services and Support Agreement, Hosting Agreement or Subscription Agreement in place between Hyland and Customer:
  - A. The hosted Software environment(s) will leverage the latest commercially available version of Software; and
  - B. Subsequent Software upgrades will be completed by GCS upon Customer request.
2. Project start date(s) are subject to a mutually agreed upon schedule after execution of contract;
3. Professional Services will be delivered utilizing Hyland's standard implementation methodology;
4. 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.
5. Upon mutual agreement between Hyland and Customer, the Cloud Migration Strategy Document replaces any previous form of scope or solution proposal and becomes the then current project scope. Any changes to the scope per the Cloud Migration Strategy Document may require review and re-estimation of the work effort, timeline, and pricing to deliver, and, based on such review and re-estimation, Hyland will determine whether the Project Change Control Process is required;
6. 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;
7. 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
8. 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 or has undergone 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 migration;
6. Customer will provide trained technical team member(s) to assist in supporting and maintaining all aspects of the on-premise 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;
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 on-premise 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. For any Onsite Services, access must be provided prior to Hyland's arrival at Customer facilities and/or project discovery sessions.
2. Customer has a properly setup environment in accordance with Hyland's prerequisites. Setup consists 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 has proper setup of on-premise networking and required third party software environment(s) in accordance with Hyland's prerequisites;
4. 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;
5. Customer will manage setup, execution, and validation of database maintenance plan(s) for each on-premise Software instance;
6. Customer will perform routine, scheduled backups and maintain disaster recovery and contingency plans for each on-premise Software instance;
7. Customer will manage third party application setup (i.e. installation, configuration), testing, training, and go-live support related to integration(s) with Software;
8. Customer will package and deploy all Software clients, unless otherwise defined within this Services Proposal; and
9. 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 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.

Project	Billing Type	Cost (USD)
Project 1 – Migration to Hyland Hosted Environment	Fixed Fee	\$70,200.00
	25% Discount	<b>(\$17,550.00)</b>
	<b>Total</b>	<b>\$52,650.00</b>

Payment Milestones			
The costs for the above project(s) represent fixed price Professional Services. Payment milestones for the engagement(s) will be invoiced as listed below.			
Milestone	Description	% of Total	Amount
<b>Project 1 – Services for Migration to Hyland GCS Hosted Environment</b>			
1	Project Initiation Call	34%	\$17,901.00
2	Delivery of Cloud Migration Strategy Document	33%	\$17,374.50
3	Upon Production Cut-over Date	33%	\$17,374.50
<b>Total</b>		<b>100%</b>	<b>\$52,650.00</b>

### Pricing Assumptions

The pricing was created using the following assumptions:

1. The above cost includes Professional Services fees anticipated to complete the project(s) successfully;
2. The above cost reflects a one-time, twenty-five percent (25%) discount against Hyland fixed fee Professional Services, in accordance with the applicable terms of the Master Software License, Services and Support Agreement, Hosting Agreement or Subscription Agreement in place between Hyland and Customer; and
3. The fixed fee was determined based on information provided to Hyland by Customer and assumptions developed by the parties based upon that information. In the event that (a) any such information is inaccurate or necessary information was not provided to Hyland, (b) Customer fails to fulfill its obligations during this Contract, or (c) reasonably unforeseen technical or system limitations exist or arise, and any of such causes materially and adversely affect the performance of the Professional Services, this fixed fee shall be adjusted equitably to reflect the impacts of such circumstances following the Project Change Control Process.

## SIGNATURES

**The City of Pembroke Pines, FL**

**Hyland Software Inc.**

By :

By :

Name : (Print)

Name : (Print)

Title :

Title :

Date :

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
<b>Advanced Capture Consultant</b>	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.
<b>Business Consultant</b>	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.
<b>Conversion Consultant</b>	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.
<b>Database Engineer</b>	Provides expertise related to the Software database. Makes recommendations on best practices, maintenance plans and disaster recovery considerations.
<b>Enterprise Consultant</b>	Provides long-term business planning and analysis to expand and support Customer's Software solution. Develops strategies and roll out recommendations based on Customer needs resulting from enterprise assessments and coaching. Acts as a program manager for individual projects within an organization to ensure Customer remains educated on Software capabilities and additional opportunities.
<b>Infrastructure Analyst</b>	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.
<b>Integration Engineer</b>	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.
<b>Principal Consultant</b>	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.
<b>Program Manager</b>	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.
<b>Project Manager</b>	Provides project management expertise and is the initial point of project escalation. Manages project initiation, develops the project charter and plan, and coordinates schedules and resources. Tracks burn down rates, project/solution issues, scope creep and impact, generating change orders as needed.
<b>Technical Consultant</b>	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
<b>Project Charter</b>	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.	
<b>Project Plan</b>	Defines the projected schedule of project events from initiation through closure.
Delivered within the initiation/discovery phase and updated throughout the project.	
Includes the activities, deliverables, assignments and dates required to complete the project.	
<b>Project Status Report</b>	Provides an overview of project health and important related details.
Delivered after initiation and then regularly throughout the project in a frequency to be determined by the Hyland and Customer Project Managers (e.g., bi-weekly).	
Includes details about the project health, financials (budgeted vs. actuals), critical action items, upcoming key activities, outstanding deliverables, change requests and notable issues/risks.	
Each updated report requires a shared review with Customer and Customer verification for accuracy.	
<b>Cloud Migration Strategy Document</b>	Provides overall approach for the migration to the cloud.
Delivered after the discovery sessions with Customer.	
Includes details into the required steps and strategy to migrate Customer's Hyland software solution. This document will also include updates required to any integration points within the solution and environment, and any other recommendations necessary to communicate.	

\*\*\* END OF DOCUMENT \*\*\*