



KONICA MINOLTA

ENTERPRISE CONTENT  
MANAGEMENT

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# GIVING SHAPE TO IDEAS



Lexington-Fayette Urban County Government

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**ENTERPRISE CONTENT MANAGEMENT SOLUTION**

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### PROPRIETARY AND CONFIDENTIAL INFORMATION

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## DOCUMENT PROPERTIES

### ATTRIBUTES

<b>Prospective Client:</b>	Lexington-Fayette Urban County Government
<b>Opportunity:</b>	Engineering New Development
<b>Document Type:</b>	Proposal Summary
<b>Current Version:</b>	1.1
<b>Responsible Group:</b>	<b>KONICA MINOLTA BUSINESS SOLUTIONS U.S.A., INC.</b> Business Intelligence Services, Enterprise Content Management
<b>Prepared By:</b>	Robin Brockman, ECM Sr. Solutions Consultant Reece Savage, ECM Pre-Sales Engineer
<b>Document Expiration Date</b>	3/31/2020

## PROJECT DISTRIBUTION LIST

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## INTRODUCTION

KMBS is pleased to present this proposal to LFUCG Engineering. The purpose of this document is to present an understanding of the anticipated solution, its related preliminary requirements, initial specifications and budgetary requirements of the proposed implementation. The proposal is a result of a collaborative effort between LFUCG and KMBS ECM, with requirements and deliverables being established by both parties.

## EXECUTIVE SUMMARY

LFUCG Engineering has implemented the OnBase solution for the management of the Capital Construction project. The solution includes an OnBase/ESRI integration. LFUCG Engineering is looking to expand the solution to include New Development projects. Currently, there is a backfile of new development residential and commercial files stored in paper form in filing cabinets. KMBS will create a solution very similar to the Capital Construction project that will provide LFUCG

Engineering the ability to scan, store and retrieve the historical and go forward New Development documents from within OnBase, eliminating the need to retain paper files going forward.

## PROPOSED SOLUTION SCOPE

### PURPOSE

KMBS will provide software installation, development, training, and implementation support services to LFUCG in a collaborative environment to meet the ECM solution objectives of the Engineering New Development area. The platform for this project will be based on the **OnBase Enterprise Content Management / Content Services System**.

### SCOPE

KMBS ECM will review and expand upon the requirements listed below, analyze and document the resulting discovery, design, configure, integrate, test, and implement the ECM solution according to the guidelines identified in the Proposal Summary.

### DISCOVERY

Discovery sessions will consist of working with LFUCG's subject matter experts alongside the LFUCG's Systems administrator to determine the overall scope of the solution and outline the exact requirements. Konica Minolta will provide LFUCG a Functional Requirements Document which outlines at a high level the information gathered during the discovery process and agreed to by LFUCG.

### IMPLEMENTATION

Konica Minolta will provide implementation services to perform the installation and test the functionality of the Software solution. "Implementation" includes both the Installation and Configuration stages outlined below (see 'Estimated Services' table below). Konica Minolta will implement the agreed upon solution in **one (1) non-production environment** (i.e. test), and shall be specific to the configuration and use of Engineering New Development. Konica Minolta will work with LFUCG's Software administrator and provide hands on training throughout the implementation process to ensure that additional requirements identified outside the scope of this project can be implemented by LFUCG's administrator.

The following does not imply any limitations within the software being proposed but is typical service offering based on our experience implementing projects similar to Engineering New Development. In many cases, once trained, the OnBase Administrator would be capable of providing additional configurations once this project is completed. Each item in the scope is negotiable, for example if you think more Document Types will be required and would like Konica Minolta to increase services to account for additional functionality it may be requested before this documents is signed and executed.

### Configuration

#### Basic Components

- Up to **Two (2)** Document Type Groups – Top level grouping of Document Types defined in OnBase, generally Group/Department Specific and up to **One (1) Disk Groups** pending Discovery Phase to define.
- Up to **Twenty-three (23)** Document Types.
- Up to **Eight (8)** Security Groups – Specific permissions for access and functionality.
- Up to **Ten (10)** unique Keywords – Used to identify Documents
- Up to **One (1)** Autofill configuration – Used to automatically populate keyword values using out of the box techniques (ODBC database lookups or internal data sets). More complex autofill processes (scripted, Web Services calls, API use, etc.) will require a change order.
- Up to **One (1)** Document Import Process – Used to import documents scanned and indexed by the Lexington BPO Center.

#### Capture

- Update existing ESRI Integration Configuration to account for new document types.

#### Workflow

- None at this time

## TRAINING

Konica Minolta will provide the Train the Trainer services, this proposal includes up to **One (1)** session of up to **Two (2)** hours per session for up to **Two (2)** Administrators. End user training is available but will require a change order.

## TESTING

LFUCG will be responsible for testing the Software within the current business process. The duration of end user testing should be established by Customer and will involve the process of end users identifying potential issues or changes to the initial configuration of the Software Agenda Management solution. LFUCG shall notify Konica Minolta of such change requests and Konica Minolta will provide up to eight (8) hours of support throughout the process.

## GO LIVE

Upon completion of implementation, end user training, Customer testing phase and end user sign off, Konica Minolta will provide remote go-live preparation services and remote go-live support for up to **ten (10)** hours. Go-live preparation will include the migration of the Engineering New Development solution into one (1) production environment, smoke testing of the solution, and go-live support for Engineering New Development.

## REQUIRED DELIVERABLES

- Solution Requirements Document
- Software Solution

## ASSUMPTIONS

This proposal is based upon the below assumptions being true. If for some reason these assumptions prove not to be true, this could result in a scope change and may have an impact on the proposed cost and timeline to deliver.

- LFUCG is using existing hardware and operating systems for the solution implementation;
- This solution will be implemented based on the current production version of OnBase. If an upgrade is required due to additional functionality which may have been developed in more recent versions, LFUCG is responsible for performing the upgrade or engaging Konica Minolta in a separate work agreement to perform the upgrade. This proposal does not include scope for any upgrade work;
- LFUCG will allocate, schedule and define the subject matter experts for the discovery sessions;
- Konica Minolta is not responsible for the installation and configuration of third party software;
- Konica Minolta is not responsible for the deployment/installation of software on end user workstations. The solution engineer will work with your system administrator to identify requirements, test installation processes, and provide general consulting on the topic. However, it is ultimately the LFUCG's responsibility to roll-out the software to end user workstations;
- LFUCG is licensed for the appropriate licenses prior to the Software engagement;
- LFUCG will provide a Software system administrator that will participate actively throughout the project lifecycle;
- LFUCG will be responsible for providing Konica Minolta access to the appropriate servers and workstations to perform the configuration of the Software solution at any time of day;
- LFUCG will commit a minimum of eight (8) working hours per day to testing the Solution during the Customer Testing Support phase, which may be performed by multiple LFUCG personnel;

- Konica Minolta estimates up to two (2) hours for Administrator training and up to two (2) hours for Solution specific training for the training phase. LFUCG may request additional hours for such service under a future agreement;
- Konica Minolta estimates up to six (6) hours for the Go-Live support phase. LFUCG may request additional hours for such service under a future agreement.

## **EXCLUSIONS (NOT IN SCOPE)**

The following items listed are not in scope for the initial project:

- Data or Document Conversion – unless otherwise defined no import or migrations is required from legacy repositories.
- Manual Document Indexing
- Anything not listed in the Proposed Scope section of this document.

## SOLUTION PRICING

The estimates provided in the following sections are based upon KMBS ECM's current understanding of the ECM solution requirements.

### PROFESSIONAL SERVICES ESTIMATE

The cost estimates for Professional Services are calculated with a standard hourly rate of \$210 and based solely on the information contained within this document and previous experience in the initial implementation of the Engineering New Development ECM solution. LFUCG acknowledges that the services estimates may be modified based upon additional information acquired throughout the solution development life cycle and should plan on some degree of scope change for internal budget planning purposes.

Project Pricing Summary				
			Hourly Rate for Konica Minolta standard services:	\$210.00
			Engagement Type:	T&M
			Estimated Project Duration (in weeks):	2
High Level Project Tasks	Deliverables Description	Estimated Hours Low		Estimated Hours High
Implementation Services	Requirements Analysis, Solution Design, Solution Configuration & Development, Software Installation, Testing, Training, Go-Live Support, Project Plan, Status Reports, Status Meetings, and other project related tasks	36	To	70
<b>Professional Services Estimated Total Based on \$210/hour Standard PS Rate:</b>		<b>\$ 7,560.00</b>	<b>To</b>	<b>\$ 14,700.00</b>

### PAYMENT TERMS

All payments are due Net 30. Professional Services hours will be billed on a monthly basis, as they are incurred.

### TIME AND MATERIALS ENGAGEMENT

This is a Time and Materials engagement based on the function explicitly included in this document. Any changes to the functionality that differs from what is included in this document will be reviewed for approval by the customer.

### TRAVEL EXPENSES

Client will reimburse KMBS ECM for all reasonable expenses incurred by KMBS ECM in connection with the performance of the services in this scope of work (such as airfare, car rental, lodging, mileage reimbursement, tolls, parking, and meals). All travel time will be subject to a travel charge. Travel charges will be applied based on the standard hourly rate. The client will be invoiced for ½ total travel time to and from the client location for each on-site visit.

Travel needs will be determined based on the specific needs of the solution and client. Detailed travel schedules will be coordinated during project initiation staged in coordination with project stakeholders. This schedule will be recorded in the project plan and refined as needed. All travel will be preapproved by client project managers and/or stakeholders.

### SCHEDULE

Once the appropriate authorization has been received, the Implementation Process identified in the Proposal Summary will be initiated with development of a formal project plan and schedule. It is very important for both organizations to

understand that starts and stops in the Implementation Process are very costly. Working together to develop a workable plan that will ensure a smooth process is critical to the overall success of the project.



**PROPOSAL ACCEPTANCE****CLIENT:** Lexington-Fayette Urban County Government**OPPORTUNITY:** Engineering New Development

By signing below, the authorized representative(s) from LFUCG acknowledge that they have read, agree to and accept this Proposal Summary and the Proposed Statement of Work contained within.

**Lexington-Fayette Urban County Government Approval**

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Approver	Signature	Date Signed
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**KMBS Regional Sales Approval**

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Approver Title	Signature	Date Signed
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**KMBS Professional Services Approval**

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Approver Title	Signature	Date Signed
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***Statement of Confidentiality***

This document contains information that is privileged, confidential and subject to copyright – it is tendered for the exclusive use of LFUCG and its employees only. No portion of this document, including any and all of the supporting materials submitted within the document or in addendum to, may be transmitted to third parties or reproduced without prior written approval by Konica Minolta Business Solutions.

***Validity***

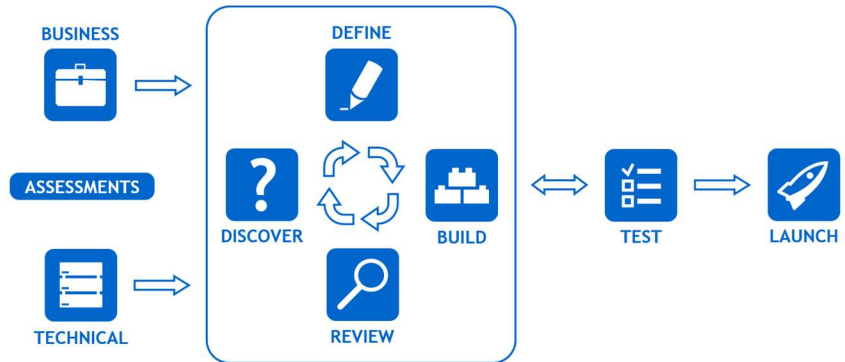
This document shall remain valid until 03/31/2020. Konica Minolta reserves the right to make changes in specifications and other information contained in this document without prior notice.

BACK OF PROPOSAL ACCEPTANCE  
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## APPENDIX A - ECM SOLUTION DELIVERY

### METHODOLOGY OVERVIEW

KMBS ECM has adopted a customer centric methodology to the development and deployment of ECM solutions. These solutions typically change and streamline a client’s business processes while removing the paper from those processes. By actively engaging the client throughout the solution development life cycle, KMBS ECM has found that clients are more likely to have successful projects, with fewer change management issues related to their re-engineered business processes.



Each ECM deployment is broken down into specific deliverables, effectively giving the client the opportunity to sign off on key elements of the project along the way. This approach ensures that the client is able to make ‘course corrections’ during solution development and helps them gain a better understanding of the various solution components.

The Business and Technical Assessments are performed prior to beginning the discovery process. The purpose of the Business Assessment is to validate the information gathered throughout the sales process and begin the planning for the Discovery phase. The purpose of the Technical Assessment is to confirm that the client’s network will meet the OnBase installation standards and begin working with the client’s IT department in planning the installation of the OnBase software. Once the network environment meets the installation criteria, the Solution Engineer will install the OnBase software.

The Discover and Define phases allow KMBS ECM to gain a better understanding of the client’s business process needs and formulate the requirements for the eventual solution. This information is presented to the client in a series of solution requirement documents that correspond with, but are not limited to, the following ECM elements: Taxonomy, Integration and Capture, Retrieval, Workflow, and Security. It is the goal of the KMBS ECM team to deliver these documents with the most complete and accurate information as possible prior to configuration. However, additional information frequently comes to light throughout the solution development life cycle. When that occurs, the new information will be incorporated into the requirement document currently under development, even if the update is related to configuration elements identified in a previous document. Depending upon the nature of the additional information, a change order may be necessary to account for any additional work/time that will be required to incorporate the modified requirements.

The Build and Review phases occur following the sign-off of each solution requirement document. The Solution Engineer will configure the elements identified and present the results to the project team. Any requested modifications resulting from the review will be noted and incorporated into a configuration acceptance document.

The Test phase encompasses both system end-to-end testing by the Solution Engineer and User Acceptance Testing by the client’s designated testers. We encourage our clients to involve not only the project stakeholders, but key end users during all of these phases.

Finally, the launch or Go Live phase is when the solution is transitioned into the production environment for active use.

This “build a little, show a little” approach throughout the solution development life cycle, along with actively involving our clients, helps them make the transition to the new processes and paperless environment, quicker and easier.

## **ENGAGEMENT MANAGEMENT**

In support of the customer centric methodology for the implementation of ECM solutions, KMBS ECM has adopted the Engagement Management concept, with an Engagement Manager fulfilling the responsibilities of both a Business Analyst and a Project Manager for the KMBS ECM project team. The Engagement Manager serves as the primary point of contact throughout the project and is directly involved with the development and execution of the solution. They establish the KMBS ECM project plan and schedule, making sure that the right resources are involved at the right time. This allows the Engagement Manager to provide timelier communication, with greater clarity and visibility, throughout the project implementation.

## **IMPLEMENTATION PROCESS**

The KMBS ECM Implementation Process begins with a 'soft' project launch of the Business and Technical Assessments and is completed after Go-Live. The basic course of events for the implementation of a typical ECM solution is as follows:

1. 'Soft' Project Launch [KMBS ECM]
  - a. Business Assessment
  - b. Technical Assessment
  - c. High-Level Project Plan Development
2. Software Installation [KMBS ECM and Client's IT Representative]
3. Formal Project Launch [KMBS ECM and Client's Project Team]
  - a. Kickoff Meeting including review of Project Roadmap
4. Solution Development – Customer centric Methodology. Completed for, but not limited to, each of the following ECM elements: Taxonomy, Integration and Capture, Retrieval, Workflow, and Security.
  - a. Requirement Identification and Documentation [KMBS ECM and Client's Project Team]
  - b. Requirement Review [KMBS ECM and Client's Project Team]
  - c. Configuration [KMBS ECM]
  - d. Configuration Review [KMBS ECM and Client's Project Team]
5. End-to-End System Testing [KMBS ECM]
6. Solution Documentation Development [KMBS ECM]
7. Training: Train-the-Trainer [KMBS ECM and Client's designated trainer]
8. User Acceptance Testing (UAT) [Client's Project Team]
9. Change Order Process [KMBS ECM and Client]
10. ECM Solution Acceptance [Client]
11. Cutover to Production Environment [KMBS ECM and Client's IT Representative]
12. ECM Solution Go-Live
13. Post Go-Live Support

This implementation process has been specifically designed to streamline solution delivery, while providing a high level of communication and involvement by the client throughout.

## **SOLUTION TESTING**

The Solution Testing phase is focused on two areas of activity:

- **System End-to-End Testing**

The system testing is conducted by the KMBS ECM Solution Engineer responsible for the development of the solution. This testing is not done to test all possible positive and negative conditions (this is reserved for functional

and integration testing), but to instead execute business functions and infrastructure management (i.e.; batch processing, system security features, backup and recovery etc.) in an isolated and controlled environment to validate that a quality system is ready for production.

- **User Acceptance Testing**

KMBS ECM believes that client ownership of User Acceptance Testing (UAT) results in a more accurate and successful test phase. It is for this reason that UAT is solely the responsibility of LFUCG. The involvement of all personnel (Managers, Department Heads, Administration Staff, etc.) who will be using the solution is highly recommended. The KMBS ECM Solution Engineer will administer a training session in which the designated testers are provided with the necessary material and education to conduct successful testing.

The goal of UAT is to simulate actual business process scenarios and validate that the solution will perform correctly in a production environment and that the established acceptance criteria have been met. The data/documents used for testing should make sense from the user's perspective, therefore the use of actual production data/documents is ideal.

UAT will be completed by LFUCG within three weeks (or the agreed upon time span in project plan) after KMBS ECM has provided the release build.

KMBS ECM is committed to verifying that the solution has been fully tested, and will not support going live (transitioning to the production environment) until all of the project acceptance criteria have been met, and LFUCG has acknowledged and signed off that the scope of the project has been achieved. This project acceptance policy is in place to ensure that a high level of commitment is placed on User Acceptance Testing, which helps ensure a successful go-live.

## **SOLUTION TRAINING**

KMBS ECM follows a "Train the Trainer" education model for ECM solution training. The "Train the Trainer" session will be conducted by the KMBS ECM Solution Engineer and they will provide LFUCG's designated Trainer or System Administrator the necessary material and information to conduct the subsequent training of the end users.

There are several benefits to this learning technique.

1. **Knowledge Retention** – People tend to pay attention when they know that the next time they'll be the instructor.
2. **Learning by Teaching** – Teaching a topic is the best way to reinforce your knowledge. By encouraging staff to teach, they are encouraged to become experts.
3. **Creating Leaders** – Teaching others builds leadership skills.
4. **Cost Reduction** – Using your own staff as instructors can dramatically reduce training expenditures.
5. **Training Follow Up** – When your trainers are your own employees, there are increased opportunities for follow ups.
6. **Social Reinforcement** – It has been shown that people are more likely to retain knowledge when they know the teacher.
7. **Skill Retention** – By building a culture of teaching, greater depth of skill retention can be achieved within an organization.

## **SOLUTION ACCEPTANCE**

Final Solution Acceptance is dependent solely upon the criteria defined in this proposed Scope of Work, and any associated Change Orders that may result during the solution development life cycle.

## **ADMINISTRATION TRAINING**

System Administration and Workflow Administration training is also available from Hyland OnBase. KMBS ECM strongly recommends that a LFUCG representative enrolls and completes these courses prior to solution Go-Live. More information on course scheduling and pricing is available from your Solution Account Manager.

## ROLES AND RESPONSIBILITIES

Common roles and responsibilities are defined so everyone will understand what is expected of them on the project. Upon joining the project, a resource will be assigned one or more of the following roles. Resources that have been assigned multiple roles are expected to meet all the responsibilities for those roles.

### LEXINGTON-FAYETTE URBAN COUNTY GOVERNMENT

#### *Project Sponsor*

The Project Sponsor provides high-level oversight and guidance for the project to ensure that the project solution meets overall schedule and cost objectives.

Responsibilities include:

- Review of milestones
- Review and resolve escalated issues
- Risk review
- Approve major change requests

#### *Project Manager*

The Project Manager will act as a communication and resource allocation point for the KMBS ECM Engagement Manager. Responsibilities include:

- Coordinate LFUCG personnel and schedules
- Assist with issue resolution
- Project deliverable review and acceptance
- Change management
- Interface with KMBS ECM Engagement Manager

#### *Subject Matter Experts*

The Subject Matter Experts provide ongoing business expertise and insight to the business processes that will be impacted by the ECM solution, specifically input/feedback on the current process and future process. Responsibilities include:

- Participate in discovery sessions
- Contribute to the definition of the business and functional requirements of the solution to be implemented

#### *IT Resources*

IT staff will need to coordinate with the KMBS ECM Solution Engineer for the following activities:

- Hardware Preparation: Setup the hardware and software (operating systems) on which the ECM application will be installed.

- Desktop Support: Setup or deploy any software required for the solution on the desktops.
- LAN Administration: Setup the rights and privileges for the solution to operate successfully within the LFUCG network.
- DBA: May need to be available during ECM software installation.

### KMBS ECM

#### *Engagement Manager*

The Engagement Manager serves as the primary point of contact throughout the project and is directly involved with the development and execution of the solution.

Responsibilities include:

- Gather and document solution requirements
- Coordinate KMBS ECM team personnel and schedules
- Preparation and maintenance of the project schedule and budget
- Project communication
- Issue tracking
- Draft Change Orders
- Business Change Management

#### *Solution Engineer*

The Solution Engineer develops the ECM solution as indicated in the solution requirements document.

Responsibilities include:

- ECM software installation
- ECM software integration
- ECM solution configuration
- System testing
- Solution training
- Solution documentation
- Issue resolution

## APPENDIX C - ONBASE TRAINING

Hyland offers an extensive array of training courses covering basic as well as advanced solutions and techniques to enable our customers to fully leverage the capabilities of OnBase. Hyland provides classroom, online, self-paced, video, conference, and e-learning education programs that ensure ECM professionals achieve competency and organizations realize the full potential of their investment.

### Instructor-led Courses

Hyland offers comprehensive training courses to provide both end users and System Administrators the knowledge that they need to design, install, use and maintain the OnBase solution.

Classroom, online and onsite courses are available.

- **Classroom** – In- person guided education facilitated by Hyland expert instructors. OnBase Classroom courses leverage the advantages of collaboration and perspective of attendees to explore real life scenarios hands-on and develop the resulting solutions.
- **Online Classroom** – Live, instructor-led sessions that drive active participation and collaboration. Online courses provide active and engaging education for attendees, using hosted lab machines to complete course activities and practice the functionality learned in class.
- **Onsite** – Classroom courses can be conducted at organizations throughout the world. The onsite courses allow multiple attendees from an organization the ability to attend a course while working collaboratively with their peers and developing action plans specific to their OnBase solution.

Your end users can take advantage of the course design to focus on your organization's current real challenges while collaborating with Hyland and others in the course to get the answers you need.

A complete list of available courses can be found on our website at <https://training.onbase.com/en/courses/instructor-led>

### eLearning

All eLearning courses offer insight into specific solutions and products or prepare learners for Instructor-led courses. All eLearning courses are free of charge for OnBase customers with an active maintenance agreement.

End User courses focus on providing OnBase users the knowledge they need to interact with OnBase. Hyland provides more than 60 eLearning courses including:

A complete list of courses can be found at <https://training.onbase.com/en/courses/eLearning/>

**Quick Look** - Is the weekly eLearning series dedicated to expanding your knowledge beyond the classroom. Each week a new topic or lesson is released in the series. View a list of courses here -

<https://training.onbase.com/en/courses/eLearning/quick-look>

**Premium Subscription**

Premium Subscription is the industry-leading, on-demand training tool from Hyland Software. It is designed to provide your organization with round-the-clock access to a growing gallery of on-demand training courses. It is targeted, OnBase technical training available anytime, anywhere and for everyone. That means easy access to OnBase Professional development for your OnBase team.

Premium Subscription contains **200+ hours of on-demand OnBase technical training courses**. Organizations with a subscription have 24/7 access, downloadable resources, progress tracking and more! Watching OnBase experts from any location at any time is just one feature of Premium Subscription. But, it’s the ability of your staff to immediately apply what they’ve learned that makes it effective.

When your staff can’t be in the office, Premium Subscription is available wherever they need it. Begin a course at home on Monday and finish it at the office on Tuesday, just in time for your meeting on Wednesday. Or get your whole team together and take a course as a group. Watch alone, as a group or right before your project begins. Learn more at: <https://training.onbase.com/en/courses/premium>

**Learning Paths**

These paths can be used to help you determine the makeup of your OnBase team and the professional development recommended. Each OnBase solution is different, as are the people who make up the team implementing, supporting, administering and expanding it.

Each Learning Path is a logical, step-by-step sequence of OnBase courses providing a straightforward way to expand your OnBase expertise. Role-based paths include Business Analyst, API Developer, Project Manager, System Administrator and others. Training paths can be customized for any OnBase role. Hyland Education Services can assist in creating a custom plan for any individual. See all the available paths on the Hyland Training site at <https://training.onbase.com/paths/>

**OnBase Certifications for Customers**

The OnBase Certification program recognizes IT professionals who successfully demonstrate their OnBase technical knowledge and practical experience by designing, implementing, administering and enhancing OnBase solutions.

- Organizations with OnBase Certified team members see more rapid development of their OnBase investment.
- All OnBase Certifications provide accreditation for two years.
- Role Certifications, as those noted at right, represent a development program centered on the skills necessary to be effective in that role.

Customer Certification



For more information on our certification programs visit <https://training.onbase.com/en/certifications>

**Schedule**

A complete schedule of available classroom, regional, international and online courses is available on our website at <https://training.onbase.com/en/schedule>.



## APPENDIX D - USER PROGRAMS

Hyland's User Programs are dedicated to ensuring OnBase users are receiving the latest information from new product launches to enhancements, tips, tricks and tools to unleash newfound potential within installed OnBase systems. This education happens via newsletters, online seminars, comprehensive training courses and numerous events.

### Conferences

Each year Hyland offers a number of conferences focused on educating OnBase professionals.



Hyland's premier customer event is the annual CommunityLIVE Conference. At this event, OnBase end users, partners, vendors and prospects come together for educational classes, breakout meetings and business and industry sessions. The conference provides an opportunity for OnBase customers, partners and Hyland staff to come together to share valuable information about how to get the most from an OnBase investment. A full schedule of educational sessions provides vertical, technical, and practical applications for empowering your business using OnBase, as well as complementary technologies that can drive additional cost savings and efficiency gains.

### TechQuest

Offered three times a year, TechQuest provides OnBase professionals with an in-depth experience of the latest OnBase features and functionality. Individuals can choose from over 60 sessions during the five-day hands-on technical conference, and have the opportunity to interact directly with Hyland development, quality assurance, support and services staff.

***"I love my job using OnBase, so TechQuest is like Christmas for me - can't wait to get back to work to implement my new knowledge."***

- OnBase System Administrator

### Dedicated Customer Website

OnBase users have access to our dedicated customer website - Community. The site provides a wealth of educational and product content allowing users to connect with the latest developments in OnBase, and network to discuss new ideas. Users can sign up for scheduled web-based demonstrations. They can also download on-demand content enabling them to better understand ways in which in OnBase can plug into their environments to solve specific business issues.

## User Groups

One of the greatest perks of being an OnBase user is that you're not alone – you're part of a community. And getting involved in that community is as simple as joining one of the several industry, geographical or solution-based user groups.

OnBase users organize and run these groups for other OnBase users. These groups are designed specifically to bring peers together to discuss emerging trends as well as share technology best practices and lessons learned, so we know you'll find value in participating.

### ***OnBase Groups of User Experts (VOGUE)***

As an organization, each VOGUE provides a forum to discuss software enhancements, as well as offer guidance to Hyland regarding specific document management needs specific to the industry. VOGUEs come together as a single voice and have direct engagement with Hyland regarding the future direction of the product, regularly review enhancement requests and can directly submit software change requests that may be required for industry-specific compliance.

VOGUEs are led by a board of directors dedicated to creating a true OnBase user forum where members come together to share ideas, create valuable dialogue and provide feedback about utilizing technology to increase effectiveness and efficiencies within their organizations. This results in lessons learned and best practices being shared. Because all members come from the same industry, they share the same concerns and opportunities.

An annual membership meeting is held at a physical location determined by the board of directors, which is usually scheduled in conjunction with the CommunityLIVE conference. Regular membership events are typically held on a quarterly basis and are facilitated virtually via WebEx and conference call.

### ***OnBase Solution Expert Group (OSEG)***

In addition to the industry concentrations listed above, an OnBase Solution Expert Group is also available to OnBase customers. The OSEG represents horizontal solutions in the OnBase world, such as Accounting and Finance, Human Resources and Case Management, to provide a venue for all OnBase users to build relationships with peers, influence the creation of innovative new OnBase solutions and help increase effectiveness within organizations. The OSEG builds conversation and knowledge sharing between the experts of horizontal OnBase applications.

Hyland looks to user groups to provide feedback on how OnBase could be enhanced to address the needs of the industry.