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# PROFESSIONAL SERVICES PROPOSAL

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## NEW MEXICO HUMAN SERVICES DEPARTMENT

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Document Version: 1

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Document Date: 31 Jan 2020

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THIS PROPOSAL IS VALID FOR A  
PERIOD OF **90** DAYS FROM THE  
ABOVE DATE.

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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 New Mexico Human Services Department (“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 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.

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 proposal:

### Project 1 - Software Installation and Consulting - Seven Environments

#### *Scope*

Hyland will provide services to Customer for the purpose of installing the base Software components in the Customers Development, QA, UAT, SIT, Prod-Patch, Disaster Recovery and Production Environments. Hyland will also provide consulting around the installation of the Software. Key objectives of this project will focus on the implementation of Software, and enabling Customer with the knowledge necessary to install the Software in additional environments.

Customer fully understands that at the conclusion of this engagement, the services provided may not result in a production ready solution, and any remaining tasks, including taking the Software solution live, will be Customer's responsibility as further configuration and testing may be required. Should Customer request additional services, a change order will be required.

#### *Project Initiation and Planning*

Prior to on-site activities Hyland will hold an initial kick-off call to discuss the following:

1. Prerequisites and requirements for Software;
2. Customer Software infrastructure;
3. Key objectives and business cases; and
4. Project schedule and timelines.

#### *Environment Installation*

1. Core installation of server side Software components within seven (7) environments:
  - A. Create and license Software database;
  - B. Initial setup of Software disk groups for storage of documents on Customer's file server(s);
  - C. Installation and setup of processing and/or application server(s); and
  - D. Installation of any Software modules that have been purchased.
2. Installation of Software on up to seven (7) end user workstations:
  - A. Testing base Software functionality; and
  - B. Training on Software deployment methods.
3. Hyland will provide an Architecture Diagram for future use by the Customer.

#### *Environment Consulting*

Consulting on the Customer's installation Software of three (3) additional environment.

1. Providing recommendations and testing for the purpose of training and educating Customer's Software Administrator(s); and
2. Training Software Administrator(s) on best practices and core functionality of Software components installed and/or configured for testing;

#### *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. Customer is responsible for setup of any servers, hardware and/or third party software required for Software, including but not limited to the following:

- A. Database software;
  - B. Operating Systems;
  - C. Prerequisites;
  - D. Scanners and scanning software/drivers; and
  - E. Database backup software.
2. Customer is responsible for any and all configuration and/or setup within third party software applications intended to integrate with Software;
  3. Customer is responsible to roll-out Software to end user workstations; and
  4. Customer will have hardware that meets or exceeds minimum recommendations.

*Exclusions*

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

1. Configuration of a solution in any Environment; and
2. Installation, User, Administration or Training Documentation.

*Required Resources*

<b>Resource</b>	<b>Rate Type</b>
Project Manager	Solution Consultant
Technical Consultant	Solution Consultant

For details about the required resources, please review Appendix 1. For information about the rate type, please review pricing.

*Deliverables*

<b>Deliverable</b>
Project Status Report
Architecture Diagram

For details about the deliverables, please review Appendix 2.

## Project 2 – Document Management Implementation

### *Scope*

Hyland will provide services to implement a document management solution for New Mexico Human Services Department to allow for migration, storage, and retrieval of content.

### *Document Management*

The project will include configuration of the following document management solution components:

1. Document types for up to four (4) departments;
2. Keyword types (i.e., metadata) to identify and search specific document criteria;
3. Up to four (4) AutoFill Keyword Sets of delimited flat file data auto-imported from the Customers System of Record and used for indexing secondary data (e.g., Name) related to a primary indexed key (e.g., Empl ID);
4. Up to eight (8) custom queries to facilitate common, repeatable searches of documents;
5. Up to four (4) scan queues;
6. Up to two (2) import processes;
7. Document cross references to allow for viewing related documents from a selected document;
8. Configuration of Single Sign-On Security including the setup of users, user groups, and associated solution privileges and permissions; and
9. Hyland work with Customer at the direction of both legal teams to comply with security measures set forth by the Customer.

### *Delivery*

At an agreed-upon time following project initiation, Hyland will lead an onsite requirements gathering session lasting up to three (3) days with the Customer's subject matter experts to fully define the solution. Upon completion of requirements definition, Hyland will work remotely to write-up the requirements in a Requirements Document (RD) and provide to Customer to confirm. Customer will review the RD and provide feedback and sign-off, after which Hyland will complete the configuration of the solution and associated unit testing in the test environment.

Included in the project scope is dedicated time for testing and training. The following process is used for the testing and training of this solution:

1. Hyland will provide one (1) onsite administrator training and train the trainer session lasting up to three (3) days.
  - a. The system administrator(s) will be introduced to the configured solution and how to support it. The training is meant to augment the training courses attended and certifications received by administrator(s) from Hyland Education Services separate from this engagement. Additionally, Hyland will provide a Solution Design Document.
  - b. The train the trainer session will also include a User Testing (UT) kickoff session. Both will help familiarize individuals with the Software interface and configured functionality of the solution. This training enables the Customer to test the solution's functionality as defined in the RD and train additional end users upon go-live. This training is intended for up to ten (10) testers. Additionally, Hyland will provide a Solution Design Document. Customer is responsible for training additional end users.
2. Customer will develop test cases in line with their business processes and the agreed-upon requirements of the solution per the RD in advance of the testing period of the project.
3. Customer will perform UT and provide Hyland with a notification of any issues based on the test cases developed by Customer in accordance to the requirements defined in the

RD. Hyland will provide remote support and update the Customer once the issues are resolved, whether by Hyland's project team or Customer's project team. This proposal assumes Customer's UT process will consist of one (1) cycle which is three (3) weeks in duration. Once it is determined that all test cases comply with the RD, the solution is ready for go-live; and

4. Any additional time or reallocation of time requested for testing or training shall be handled following the Project Change Control Process noted in this document.

Included in the project scope is dedicated time for go-live activities. This proposal assumes the go-live process will consist of one (1) cycle which is two (2) weeks in duration. Go-live activities will be completed remotely and include the following:

1. Migration of the solution to the production environment;
2. Consulting on a deployment method for Customer to distribute Software to all appropriate end users; and
3. Support to Customer's help desk with resolution of Software/solution questions (i.e., go-live support).

Included in the project scope is dedicated time for project closure activities including introduction to Hyland's Technical Support team, discussion of any outstanding enhancements, and next steps for future opportunities as requested by Customer.

### *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.

1. The project will consist of a total of two (2) onsite visits from two (2) resources from Hyland Software for the activities listed below. All other activities will be performed remotely;
  - a. Requirements Analysis (three (3) days);
  - b. Solution training including administrator and train the trainer (three (3) days total);
2. The solution will be implemented in six (6) non-production and one (1) production environment;
3. Customer is responsible for ensuring that Hyland Consultant will be able to remotely and independently access their environments;
4. Hyland will provide the format requirements for the AutoFill Keyword Set. Customer is responsible for extracting flat file data from Line of Business Application into a format accessible for the AutoFill;
5. Project includes one (1) prototype review;
6. Project includes one (1) training phase and UAT cycle;
7. Hyland UT support will not exceed a total of twenty-four (24) hours over a three (3) week period;
8. Once the UT period is complete, the solution will be migrated to the live environment. Changes requested post migration/go-live will require a Change Order;
9. Migration to production will be a one (1) time event;
10. Up to two (2) hours of workstation deployment testing, training, and consulting will be provided on up to two (2) workstations. It is Customer's responsibility to ensure Software is deployed to end user workstations;
11. Go-live will be a one (1) time event; and
12. Go-Live support will not exceed a total of sixteen (16) hours over a two (2) week period.

### *Exclusions*

The following items are excluded from the scope of this project:

1. Configuration of modules not specifically listed within the scope; and

- 2. Discovery or configuration of user/batch scanning/import of documents, electronic forms, and workflows.

*Required Resources*

<b>Resource</b>	<b>Rate Type</b>
Technical Consultant	Solution Consultant
Project Manager	Solution Consultant

For details about the required resources, please review Appendix 1. For information about the rate type, please review pricing.

*Deliverables*

<b>Deliverable</b>
Project Charter
Project Plan
Project Status Report
Requirements Document
Discovery Activity Summary
Traceability Matrix
Solution Design Document
Solution Training Guide
Software Solution

For details about the deliverables, please review Appendix 2.



## Project 3 - Content Composer Implementation

### Scope

Hyland will provide professional services to implement the Content Composer (“CCM”) solution.

Customer requires an enterprise-wide capable solution to support their content generation requirements across multiple areas of the company. Requirements include options to ad-hoc and interactively create communication, re-generation of documents, and batch creation to support Customer’s Line of Business (LOB) system(s). Delivery requirements include print to local printers, email, archive only, and fax. All generated content will be archived to End User’s ECM solution.

Hyland and Customer and will work together to implement the CCM solution. Hyland’s professional Services team is responsible for the planning, discovery, solution designed, installation, configuration, initial testing of the solution, and training of Customer’s resources.

This proposal provides for the initial implementation of the solution to support content generation, template creation and management of the process. Up to fifteen (15) templates, five (5) low complexity, five (5) medium complexity and five (5) high complexity templates will be created during the implementation and used during training.

The proposal assumes the Customer will take on additional template development and be responsible for updates of all imported templates from Customer’s Legacy Document Creation application following implementation and training. Training on system administration, template creation and template updates includes two workshop sessions for up to six (6) attendees each:

- Text-Administrator Basic Training (3 Days)
- System Administrator Basic Training (2 Days)

For template design and creation, the majority of template work is done in Word and does not require technical skills allowing non-technical resources to take ownership of their templates. Template creation includes the creation of object types needed for templates such as text blocks, formatting rules, business rules, list of values for manual data entry, relating document variables to data sources and deploying the template into production.

For more advanced actions, a Process Developer with scripting skills can add process actions using a mixture of graphical process elements and scripts. Process action examples include generating batches, archiving documents, printing and emailing documents.

System administrator training will cover administration activity such as the ability to create roles and map the corresponding rights to the roles, create and manage windows services, configure and check logs.

Hyland will assign the following resource types to the project: Technical Consultant, Project Manager. The availability and deployment of assigned resources will be based on a mutually agreed to schedule to be set.

Project methodology assumes an approach that includes a project kick-off, a dedicated discovery and requirements documentation period followed by development. Stability testing and training are followed by go-live.

### *Assumptions:*

This project 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.

1. Customer's ECM solution is OnBase.
2. Customer's LOB systems will utilize web services to initiate on-demand content generation or re-generation.
3. For nightly / batch print, LOB will provide information about documents to be created, all required document data in XML format and load data to an order database table.
4. Hyland and End User will work together to design the order database table(s).
5. Hyland will create up to fifteen (15) templates, five (5) low complexity, five (5) medium complexity and five (5) high complexity templates, as part of the implementation:
  - a. Light complexity templates are defined as up to two (2) pages, up to one (1) table, and zero (0) barcodes;
  - b. Medium Complexity templates are defined as up to four (4) pages, up to two (2) tables and zero (0) barcodes;
  - c. High Complexity templates are defined as up to fifteen (15) pages, up to three (3) tables and one (1) barcodes;
  - d. If documents are more complex than outlined above, Hyland needs to review the document(s) in order to correctly scope the template creation effort.
6. Customer will continue to build out templates and update all imported templates.
7. Customer is responsible for LOB system changes required to initiate web service calls, generate XML data files, and to load the order database table to support nightly / batch print.
8. Customer/End User will have a full time Project Manager to manage the project. Hyland will provide a Project Manager to support the Customer/End User Project Manager to coordinate the project schedule, assign tasks, ensure that the End User's business users are available and involved, and engage End User's project sponsor(s) as necessary.
9. Project start date(s) are subject to mutually agreed upon schedule after execution of contract.
10. Hyland resources will provide support for this project during regular business hours agreed upon by Customer and Hyland.
11. The implementation estimate accounts for one (1) weekly project status meeting between Hyland and the Customer. It does not account for daily stand-up meetings.
12. Requirements documents will be reviewed and signed off on by End User in advance of development start; and
13. The solution will be implemented in six (6) non-production and one (1) production environment.

### *Exclusions*

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

1. Requirements not documented in the project above;
2. Generating output in AFP format.
3. Any Filter solution such as Postage Optimization or Envelope Selection.
4. Adding OMR codes on content.
5. Adding of different Dec-Pages on stacks built through the different filter processes.

*Required Resources*

<b>Resource</b>	<b>Rate Type</b>
Technical Consultant	Solution Consultant
Project Manager	Solution Consultant

For details about the required resources, please review Appendix 1. For information about the rate type, please review pricing.

*Deliverables*

<b>Deliverable</b>
Project Charter
Project Plan
Project Status Report
Requirements Document
Discovery Activity Summary
Traceability Matrix
Solution Design Document
Solution Training Guide
Software Solution

For details about the deliverables, please review Appendix 2.

## Project 4 - Implementation Consulting

### *Scope*

Hyland will provide services to Customer for the purpose of consulting around the implementation of the Software. Key objectives of this project will focus on the support of the implementation of Software, and enabling Customer with the knowledge necessary to configure the Software successfully moving forward.

Customer fully understands that at the conclusion of this engagement, the services provided may not result in a production ready solution, and any remaining tasks, including taking the Software solution live, will be Customer's responsibility as further configuration and testing may be required. Should Customer request additional services, a change order will be required.

### *Consulting*

Hyland will provide consulting services to Customer to determine cooperatively with Customer its business, technical and operational approach to various business problems as defined by Customer. The consulting services contemplated under this contract may include the following areas based on Customer's needs:

1. Defining specific projects, timelines, and resource requirements related to the Customer's use of the Software or other related systems or processes;
2. Recommending approaches to business problems, and technical solutions, which may include development of documentation and other items related to the provision of these recommendations;
3. Providing guidance on best practices for use of the Software, technical architecture and design, system reviews, and assistance in troubleshooting issues in Customer's environments; and
4. Providing assistance or consulting on design, development, testing, documentation and/or go-live support around Customer's organizational initiatives.

The parties acknowledge and agree that the enterprise consulting services may not be adequate to satisfy Customer's need for any detailed discovery or implementation for any of the requirements gathered.

### *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. Customer is responsible for setup of any servers, hardware and/or third party software required for Software, including but not limited to the following:
  - A. Database software;
  - B. Operating Systems;
  - C. Prerequisites;
  - D. Scanners and scanning software/drivers; and
  - E. Database backup software.
2. Customer is responsible for any and all configuration and/or setup within third party software applications intended to integrate with Software;
3. Customer is responsible to roll-out Software to end user workstations; and
4. Customer will have hardware that meets or exceeds minimum recommendations.

### *Exclusions*

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

1. Implementation of a solution;

2. Installation and configuration of any additional environments; and
3. Installation, User, Administration or Training Documentation.

*Required Resources*

<b>Resource</b>	<b>Rate Type</b>
Business Consultant	Solution Consultant
Integration Engineer	Solution Consultant
Technical Consultant	Solution Consultant

For details about the required resources, please review Appendix 1. For information about the rate type, please review pricing.

## KEY ASSUMPTIONS

The following are key assumptions that impact the success of the solution, and are applicable to all Project Areas within this 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 both onsite at Customer location in Santa Fe, New Mexico, as well as remotely from Hyland offices:
  - A. While onsite, Hyland resource(s) will work during normal operating hours generally between 8:00am and 5:00pm, Monday through Friday, in Customer's local time zone; and
  - B. 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. Upon mutual agreement between Hyland and Customer, the Requirements Document (RD) replaces any previous form of scope or solution proposal and becomes the then current project scope. Any changes to the scope per the RD 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;
5. 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;
6. 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
7. 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;
8. Customer will make commercially 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 unless termination or illness is the result of the change.

### **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 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 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 the 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 commercially reasonable efforts to execute any changes to this Services Proposal with enough lead-time to minimize the influence on the project.

# 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	Estimated Work Hours	Estimated Travel Hours	Estimated Totals (USD)
Project 1 – Software Installation and Consulting	264	64	\$54,558.64
Project 2 – Document Management Implementation	592	64	\$115,166.72
Project 3 – Content Composer Implementation	628	64	\$121,752.00
Project 4 – Implementation Consulting	300	0	\$59,344.00
<b>Total</b>			<b>\$350,821.36</b>

Rate Type	Standard Hourly Rate
Business Consultant	\$205.79
Integration Engineer	\$205.79
Technical Consultant	\$181.86
Project Manager	\$191.44

### Pricing Assumptions

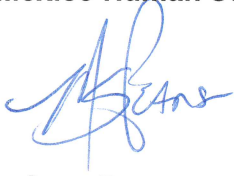
The pricing was created using the following assumptions:

1. The above pricing includes estimated Professional Services fees and the travel time anticipated to complete the project(s) successfully:
  - A. Travel time for Hyland resources is charged at one half (½) applicable Professional Services rates and will not exceed eight (8) hours per one-way trip; and
  - B. Travel expenses are not included in this Services Proposal and will be charged separately as incurred by Hyland resources.
2. For the Project, Hyland recommends a total of three (3) trips for the Technical Consultant and one (1) trip for the Project Manager to maximize project success;
3. For Project 2, Hyland recommends a total of four (4) trips across all resources to maximize project success;
4. For Project 3, Hyland recommends a total of four (4) trips across all resources to maximize project success;
5. For Project 4, Hyland recommends a total of zero (0) trips across all resources to maximize project success; and
6. 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 any applicable travel expenses.

# SIGNATURES

**New Mexico Human Services Department**

By :



Name: Sean Pearson

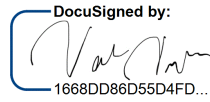
Title: HSD Chief Information Officer

Date :

2/26/20

**Hyland Software, Inc.**

By :

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Name : (Print)

Title :

Date :

## APPENDIX 1 – RESOURCE DESCRIPTIONS

The following table provides an overview of the Hyland Global Services resource types and their corresponding responsibilities. Please reference the specific Project Areas for a listing of the required resources.

Resource Type	Responsibilities
<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>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>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>Requirements Document (RD)</b>	Documents the agreed upon solution requirements.
Composed as a result of requirements gathering during discovery.	
Contains all business requirements related to the solution.	
<b>Discovery Activity Summary (DAS)</b>	Provides context to support the Requirements Document.
Details conversations from discovery sessions as well as business process and technical narratives, and important project assumptions, responsibilities and dependencies.	
<b>Traceability Matrix</b>	Supports test case development and results tracking.
Derived from the RD and includes the list of approved requirements and associated SDD components, for use by Hyland when unit testing the solution and by Customer to map and track test cases during User Testing.	
<b>Solution Design Document (SDD)</b>	Central point of reference on how the solution meets the requirements.
Outlines and defines important details about the solution functionality and configuration based upon the approved business requirements documented in the RD.	
<b>Solution Training Guide</b>	For use during initial training and update by Customer's internal Software training/education staff if solution is modified or enhanced in the future.
Contains descriptions of user interface (UI) and components configured for the solution.	
<b>Architecture Diagram</b>	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.	
<b>Software Solution</b>	The Software configuration delivered at the conclusion of the Project, as described in the RD.
Implementation of the requirements defined in the RD.	

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