

INSTALLATION PROCESS: ETRIEVE PLATFORM

PHASE 1 Pre-Discovery

- ▶ Softdocs receives Purchase Order from Client.
- ▶ Softdocs and Client identify project leads (one from Softdocs side, one from Client side).
- ▶ Project teams schedule a “kickoff meeting” to review and discuss scope of work, Discovery timelines and hardware requirements.

PHASE 2 Hardware Configuration

- ▶ Softdocs consults with Client IT/IS staff on infrastructure building, to ensure compatibility with Softdocs products.
- ▶ This phase can be worked on in conjunction with Phase 3. The hardware and installation of the individual solutions has to be completed before Phase 4 begins.

PHASE 3 Discovery and Documentation

- ▶ Softdocs Business Analyst(s) visit Client site to review business processes for department(s) / business area(s) identified in scope of work.
- ▶ Business Analyst(s) interview Client departmental leads and staff members to gain an understanding of departmental business flow and decision logic.
- ▶ Business Analyst(s) collect and review information pertinent to the project and identify any red flags that may lead to delays or process changes.
- ▶ Discovery Fact Checkers, Gap Analysis Guides, Implementation Plans and Project Configuration Workbooks are created and delivered to the Client project lead for distribution to appropriate departmental staff members for their review.

PHASE 4 Admin Training

- ▶ Softdocs Business Analyst(s) train the Client’s “Softdocs Administrators” on how to configure and maintain the licensed solutions.
 - Security will be verified and training on imports will generally be conducted as well.

- ▶ After Admin Training is complete and the Solutions are configured, other licensed modules may require remote training.
- ▶ Softdocs Business Analyst(s) will work with the Client Softdocs Administrators to ensure that all configurations are completed and tested prior to moving to Phase 5.

PHASE 5 Implementation/Training—Departmental

- ▶ A training plan based upon Discovery findings and the Implementation Plan is created and reviewed with the Client.
- ▶ Softdocs Business Analyst(s) visit the Client site to train at the departmental and end-user levels, with the goal that each user understands how the solutions apply to their daily tasks, and can successfully operate and utilize them.
- ▶ As each department / business area is trained, they are considered to be live on the Softdocs Applications.

NOTE If a project involves many varying departments or business areas, the implementation may be split. In such a case, once Phase 5 is completed, we will return to Phase 3, skip Phase 4, and move to Phase 5 once the client has configured the system for the new departments / areas.

PHASE 6 Post Implementation Support

- ▶ Softdocs and Client project leads remain available to provide post-implementation support to departments and business areas.
- ▶ Once departments / business areas are comfortable with the solutions in place, support is transitioned to the Softdocs Support Team.