

TAB FusionRMS – Application Development and Implementation Process

TAB Products Co LLC has a long standing reputation for a disciplined best-practice approach to Records Management product delivery. The most successful TAB FusionRMS application implementations consist of several successive phases commencing with requirements gathering and concluding with final delivery and systems acceptance. 100% customer satisfaction is the standard and acceptance signatures are a measurement of our adherence to standard.

Implementation Phases Overview

Requirements Analysis and Documentation

Using the Pre-Sales consultative information obtained and Purchase Order as a basis of understanding, interviews are conducted with stake holders, system administrators, and users to clarify and determine definitive needs, and to more fully understand current workflow processes. Interviews will include phone and email correspondence. When all the facts have been confirmed and documented the application will be configured against those requirements in the next phase.

System Configuration

Using the information gathered in the Requirements phase the system's tables, fields, forms, reports, and workflow, etc... will be configured. The application will be loaded with sample data and the configuration will be tested against expected functional results as required. A demonstration of the system in a test environment will be conducted, and adjustments to the configuration are made as required to fulfill expectations. When the customer agrees system as demonstrated performs according to expectation, the Functional Specification is created in the next phase.

Functional Specification

This phase involves the drafting of the formal Functional Specification document. It is a statement of work that clearly outlines and defines the project deliverables. It details how the system is configured, and illustrates defined functionality and workflow processes. In order to move the implementation process to the next phase this document must be approved by both the TAB FusionRMS Project Manager and the customer's key stakeholders.

Training Documentation

The Successful implementation of any system requires properly trained users and system administrators to insure the product is being utilized in the most efficient and effective manner for which it was intended.

As part of the definitive need analysis conducted in the Requirements Analysis and Documentation phase the functional details and training approach will have been clearly identified, and the number of trainees documented. Custom training materials to compliment training activities will be produced from, and when the system's Functional Specification has been approved. Both the training materials and the curriculum will correspond directly with the Functional Specification.

Installation & System Acceptance

The system acceptance phase involves the actual final delivery of the approved system as detailed in the Functional Specification documentation. At the conclusion of the installation the system is tested against the requirements detailed in the Functional Specification. The client's satisfaction is then evidenced by the signature on the Systems Acceptance document. The implementation is then considered complete, and the TAB FusionRMS System is brought into a live state ready for operational use and Maintenance.

Training Acceptance

At the conclusion of the Systems Acceptance phase training will commence at the designated location(s), according to the time schedules and attendees listed in the signed Functional Specification document. At the conclusion of training a signed Training Acceptance document by the customer is required, and indicates the customers level of satisfaction with the training material provided, and the course(s) conducted met or exceeded expectations as documented per the project's Functional Specification. Upon signed acceptance, the implementation is considered completed, and now moves into the Maintenance phase.

Maintenance & Support

Customers with active maintenance contracts have access to the Help Desk and a staff of product developers, product support engineers, and system specialists that handle unique customer requirements via regular toll free telephone support, including remote WebEx login terminal support via the internet at no additional costs. This service is available Mon. – Fri. 5am to 5pm PST.

Technical issues reported to the TAB FusionRMS Help Desk are logged and assigned a level of severity using the criteria listed below:

- **Severity 1:** System is down, business is impacted. TAB will commit all necessary resources to resolve the situation.
- **Severity 2:** Operation of system is severely degraded, or significant aspects of your

business operation are negatively affected by inadequate performance. TAB will commit full-time resources during normal business hours to resolve the situation.

- **Severity 3:** Operational performance of system is impaired while most business operations remain functional. TAB is willing to commit resources during normal business hours to restore service to satisfactory levels.
- **Severity 4:** You require information or assistance with TAB FusionRMS product capabilities, installation, or configuration. There is little or no effect on your business operations.

All system enhancements, upgrades, hot fixes, patches, etc. are included with system maintenance. Implementation of all upgrades can be conducted by customer personnel with assistance available via the TAB FusionRMS Help Desk if needed. On-site visits are not covered by maintenance, and are chargeable by the hour. Travel expenses will apply.

Implementation Process Package Description and Average Duration

Statement of Work Packages	Description	Duration
1. Requirements Analysis & Documentation	Document Application Requirements	24 Hours
a. Project Management	Project phase management.	4 Hours
b. Requirements - Kickoff	Discussions regarding project expectations and assumptions.	4 Hours
c. Requirements - Analysis	Client interviews and review of current business processes.	8 Hours
d. Requirements - Documentation	Document business processes and workflow.	8 Hours
2. Data Analysis/Conversion	Analyze, convert, import, export data format and management	12 Hours
a. Data Extraction	Extract copy of source data, and clean anomalies as necessary.	8 Hours
b. Analysis of Current Structures	Analyze and document legacy data source.	4 Hours
c. Data Transfer	Setup staging tables, populate with extracted data, and test for errors and duplication.	4 Hours
3. System Configuration	Configure and setup application.	16 Hours
a. Configuration of application	Set up and create application tables based on documented requirements.	8 hours

b. Import Data	Load cleaned sample data into configured application and test functionality.	8 hours
4. Custom Documentation	Publish and Distribute	24 Hours
a. Functional Specification	Create Functional Specification Document detailing all expected deliverables.	8 Hours
b. End User Training Documentation	Create end user training course and documentation based on normal operative functionality and features.	8 Hours
c. Administrator Training Documentation	Create administrator training course and documentation based on system management functionality and features.	8 Hours
5. Installation & System Acceptance		8 Hours
a. Installation & Systems Acceptance	Install application, load data, test and validate system. Submit Systems Acceptance Documentation.	8 Hours
6. Training		16 Hours
a. End User Training	Conduct end user training	8 Hours
b. Administrator Training	Train system administrators. Submit Training Acceptance Documentation.	8 Hours
Implementation Phases	Start to finish.	100 Hours
7. Maintenance		1 Year
a. Annual maintenance	Begins when System and Training have been accepted. Expiration 1-year from acceptance date.	1 Year