



Our services are tailored to address your specific business needs. We offer a standard set of packages, outlined below, to help get your organization started. Additional professional services can be added as needed.

### Tier I Service Package

Tier I is designed for the do-it-yourself organization. This is you if:

- Your business processes are well defined and your document management needs are well understood.
- You take a jump-start approach to product installation, configuration, and deployment.
- Your company often uses Train-The-Trainer approaches where one or two individuals attend training and then return to the organization to share this knowledge.
- You've assigned an implementation project team responsible for this project, but you need expertise to assist with product installation, basic configuration, and direction as needed to support your implementation.

Service	Delivery	General Description
Train-The-Trainer Course	On-site at ColumbiaSoft Headquarters in Portland, Oregon	The 3 day Train-The-Trainer curriculum covers product functionality, usability, configuration, and systems administration.
Installation, Business Process Optimization, Core Configuration, Deployment	Remote delivery via web conferencing tools	ColumbiaSoft Professional Services will assist your existing staff with installation support and assistance configuring Document Locator for your environment.

### Tier II Service Package

Tier II is designed for organizations wanting a stronger partnership with their document management technology vendor. This is you if:

- Your business processes may be defined but are not optimized for automation.
- You may or may not have the time or the technical expertise internally to deploy your business rules and processes.
- You may want to take advantage of your vendor's knowledge and expertise to support a rapid implementation of your deployment strategy.
- You need expertise from ColumbiaSoft to provide assistance with installation, basic configuration, and business process optimization and product deployment.

Service	Delivery	General Description
Train-The-Trainer Course	On-site at ColumbiaSoft Headquarters in Portland, Oregon	The 3 day Train-The-Trainer curriculum covers product functionality, usability, configuration, and systems administration.
Product Installation Business Process Optimization Core Configuration <sup>1</sup> Deployment Post Deployment Services	Remote delivery via web conferencing tools and on-site consulting services <sup>2</sup>	ColumbiaSoft Professional Services will assist your organization with deploying and configuring Document Locator.

<sup>1</sup> This could include simple scripting if a customized step is required to meet core configuration.

<sup>2</sup> On-site consulting services require a minimum 20 hour commitment (2 days + 4 hours advance preparation).

## Tier III Service Package

Tier III is designed for organizations seeking a tightly knit partnership with their document management technology vendor. In the Tier III service package, full project and product development lifecycle management methodologies will be employed. This is you if:

- You are looking for organizational change leadership and document management integration across your business unit and into your technology platform.
- You require services that take you from product acquisition to business integration. Services may include business process definition and optimization, customization of user interface and database extensions, as well as integration with third party applications.<sup>3</sup>
- Your document managements needs include a back file data conversion.
- You need professional project management expertise to define, plan and execute your document management strategy.

Service	Delivery	General Description
Train-The-Trainer Course	Client Site	The 3 day Train-The-Trainer curriculum covers product functionality, usability, configuration, and systems administration.
Project Management Product Installation Business Process Definition & Optimization Customization Core Configuration <sup>4</sup> Testing Deployment Strategy & Execution Post Deployment Services	Remote delivery via Web conferencing tools and on-site consulting services	ColumbiaSoft Professional Services will provide resources to drive implementation, configuration and deployment of Document Locator within your organization.

## Our Approach to Serving You

ColumbiaSoft is committed to providing service excellence to your organization. Our goal is to provide you with the right level of service to meet your document management objectives. Whether you require a deep partnership with integration across your business processes and technology, or a simple integration into your current processes, we will do it in a way that makes sense for your organization. We employ an experienced team of professionals to provide a range of services as needed. This experience includes network and database administration of Document Locator, professional project management, business process expertise, and application development. This mix of talent is available to your organization throughout your investment in the Document Locator solution.

<sup>3</sup> Third-party integration beyond dynamic property linking.

<sup>4</sup> This could include simple scripting if a customized step is required to meet core configuration.



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