

# Success Path Manual

**Version 2025.2**

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## Introduction

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This Success Paths Manual provides Customers a detailed description of the Success Path Services available for purchase by Customer. Capitalized terms not defined in this Success Paths Manual have the meanings set forth in the underlying Agreement which incorporates this Success Paths Manual by referencing the Success Paths Manual

## Definitions

**“Business Daily”** means at least once per Business Day.

**“Business Day”** means any day other than Saturday, Sunday, or a government-recognized holiday.

**“Business Hour”** means a 60-minute period between the hours of 8:00 a.m. and 6:00 p.m., in the time zone of the Hyland entity that Customer has contracted with, of a Business Day.

**“Initial Response Target”** means the timeframe within which Hyland will respond to Customer’s initial submission of a support case for technical support.

**“Issue Update Frequency”** means the frequency with which Hyland will provide updates to Customer regarding the applicable support case for technical support.

**“Product”** means the product or service, licensed by Customer and governed by the underlying agreement, for which Customer has purchased Success Path Services.

**“Upgrades and Enhancements”** means any and all new versions, improvements, modifications, upgrades, updates, fixes and additions to the Product that Hyland makes available to its end users generally during the term of the Agreement, together with updates of the documentation to reflect such new versions, improvements, modifications, upgrades, fixes or additions; provided, however, that the foregoing shall not include new, separate product offerings, new modules or re-platformed software.

## Success Paths

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Success Path Services	Success Path		
	Digital	Premier	Signature
<i>Support</i>			
Initial Response Targets	N/A	Included	Included
Issue Update Frequency	N/A	Included	Included
Upgrades and Enhancements	Included	Included	Included
Designated Technical Account Manager (TAM)	N/A	N/A	Included
Customer Success Manager (CSM)	N/A	Included	Included
<i>Education and Training</i>			
Premium Subscription	N/A	1 Premium Subscription or	1 Premium Subscription or

		3 Alfresco Passports	3 Alfresco Passports
Training Discounts*	N/A	25%	50%
Hyland University Instructor Led Training	N/A	2	4
CommunityLIVE General Conference Passes	N/A	2	4
TechQuest Passes	N/A	2	4
Expert Coaching	N/A	Choose 2 available topics	Choose 4 available topics

\*Cannot be used for conference or event registrations (e.g. CommunityLIVE, and TechQuest). Cannot be combined with any other discount.

Success Path Services will be performed remotely. Unless otherwise stated herein, Success Path Services are provided during Business Hours only and are only applicable to the production instance of the applicable Product. To the extent available or stated in an Order Form, Hyland will provide Success Path Services in Customer's local language; otherwise Success Path Services will be provided in English.

The following items are specifically excluded from Success Path Services:

1. support, education, and training services for any version of the Product which is identified as being retired on Hyland's applicable secure end user web site;
2. consultation, expertise and/or support of third-party software or hardware;
3. direct configuration changes to Customer's Product;
4. services to support Customer end users directly (including, but not limited to, manual password resets, taking support calls from users, and end user training), unless otherwise agreed to in advance by Hyland in writing;
5. custom scripted elements and custom development;
6. database modifications;
7. project management and delivery utilizing Hyland's formal project methodology in any form, including Professional Services and Managed Services (as that term is defined in the Managed Services Schedule), as applicable;
8. system or solution development;
9. configuration tasks,
10. testing; or
11. migration of changes from non-production to production.

## Success Path Services

Hyland will provide support for the functionality described in the Documentation of Customer's production instance of the applicable Product. In response to support cases submitted by Customer, Hyland will use reasonable efforts to: (a) resolve the support case, which may be effected by a reasonable workaround, correction, or modification; and (b) meet the targets described in the table below based upon the Success Path Customer has purchased.

## Initial Response Targets and Issue Update Frequency Targets

	Digital	Premier	Signature
<b>Initial Response Target</b>	N/A	S1 and S2: 60 minutes* S3 and S4: 1 Business Day S5 and S6: 2 Business Days	S1 and S2: 30 minutes* S3 and S4: 1 Business Hour S5 and S6: 4 Business Hours
<b>Issue Update Frequency Target</b>	N/A	S1 and S2: Hourly S3 - S6: 2 Business Days	S1 and S2: Conference bridge** S3 - S6: Business Daily

\*Severity Level 1 and Level 2 must be reported to Hyland by phone for Hyland to meet the Initial Response Targets.

\*\*Hyland will participate in a conference bridge to provide continual updates to Customer, provided Customer remains accessible for troubleshooting from the time Hyland initially responds to the support case.

## Severity Levels

Hyland will respond to support cases based on the Severity Level that Hyland determines is most applicable to each such support case.

Severity Level	Description	Hyland Response
<b>Level 1 (S1)</b>	Total or substantial failure of the Product.	Hyland will match Customer's effort, up to and including 24-hour days, 7 days a week.
<b>Level 2 (S2)</b>	All of Customer's users are unable to access an entire portion of the Product.	Hyland will match Customer's effort, up to and including 24-hour days, 7 days a week.
<b>Level 3 (S3)</b>	The Product is usable except there is an ongoing, system-wide, severe performance degradation.	Hyland will match Customer's efforts during Business Days, up to 16 hours/day.
<b>Level 4 (S4)</b>	The Product is usable except a specific feature or functionality is not working.	Hyland will use reasonable efforts during Business Hours.

<b>Level 5 (S5)</b>	The Product is usable except for a trivial inconvenience.	Hyland will use reasonable efforts during Business Hours.
<b>Level 6 (S6)</b>	All other matters, including “how to” requests and questions about the Documentation.	Hyland will use reasonable efforts during Business Hours.

## Technical Contacts

Customer will designate specific Users as “Technical Contacts.” Technical Contacts must have a working knowledge of the Product and the overall environment; typically, Technical Contacts are Customer’s designated system administrators. Hyland may provide Technical Contacts with access to the online support portal via a unique login. Technical Contacts are exclusively responsible for submitting support cases and engaging in interactions with the Hyland technical support team. Customer permits Hyland to communicate with the Technical Contacts as necessary to provide technical support. Hyland shall have no obligation to provide technical support, by any means, to any entity or individual other than the designated Technical Contacts.

When requesting technical support, Customer’s Technical Contacts must submit the support case via Hyland’s secure end user website (currently [www.hyland.com/community](http://www.hyland.com/community)). Once such support case is submitted through the end user website, if Customer is experiencing a Level 1 or Level 2 Severity Level, Customer is advised to call Hyland’s support team (twenty-four hours a day, seven days a week) after submitting the support case (support numbers are available through Hyland’s secure end user website).

## Technical Support

To resolve an error, Hyland must be able to reproduce the error. Therefore, Customer will provide Hyland with as much information and access to systems as reasonably possible to enable Hyland to investigate and attempt to identify and verify the error. Customer will work with Hyland support personnel as reasonably needed. Customer will notify Hyland of any configuration changes it has made, such as workflow configuration changes, network installation/expansion, integrations, upgrades, relocations, etc.

Hyland will use reasonable efforts to meet the Initial Response Targets set forth in the table above based upon the confirmed Severity Level. Initial Response Targets are measured from when the Customer’s Technical Contact submits the support case to when Hyland first attempts to contact the Customer’s Technical Contact regarding such case. Hyland’s initial response may include questions seeking to clarify the issue or gather information regarding the cause of the issue. Hyland may be unable to start resolving the issue before receiving such additional information. At Hyland’s reasonable discretion, the Severity Level of a case may be updated based on the information provided to align with the Severity Level definitions.

To resolve a support case, Hyland may: (1) update the build or version of the Product; or (2) change, replace, update or upgrade the Hyland-provided hardware or software components, in each case, at

Hyland's discretion and expense.

Hyland is not responsible for providing, or obligated to provide, technical support:

- (1) in connection with any errors, defects, or issues that were caused, in whole or in part, from any: (a) alteration, revision, change, enhancement, or modification; or (b) configuration of a component that was done by a party other than Hyland or a party retained by Hyland to perform the configuration;
- (2) if Hyland has previously made available a reasonable workaround, correction, or modification which Customer has failed to implement;
- (3) in connection with any software, hardware, system, or computer networking that is not provided by Hyland;
- (4) in connection with any Work Products (as defined in the Underlying Agreement or the applicable agreement such Work Products were provided under, as applicable);
- (5) in connection with any questions related to the operation or use of application programming interfaces (APIs); or
- (6) if any party other than Hyland, or an authorized subcontractor specifically selected by Hyland, has provided any services in the nature of technical support to Customer (items (1)-(6), "Excluded Errors").

In its efforts to be a supportive vendor, Hyland may assist Customer in troubleshooting and resolving Excluded Errors, but such assistance is beyond Hyland's obligations (contractual or otherwise). Hyland may cease providing ongoing assistance with Excluded Errors at any time.

## **Upgrades and Enhancements**

Hyland will provide, in accordance with Hyland's then current policies, as set forth from time to time on Hyland's secure end user web site, all Upgrades and Enhancements, if and when released during the term of the Agreement.

Customer acknowledges and agrees that for regulatory compliance purposes, Customer may be required to engage Hyland under a Services Proposal to implement Upgrades and Enhancements to a regulated product. If Hyland offers a self-service option for implementing Upgrades and Enhancements to a regulated product, and the Customer chooses this option, Customer agrees to comply with the training, reporting, and documentation requirements established by Hyland to ensure that the implementation is performed and documented as required by applicable regulations.

## **Designated Technical Account Manager**

The Designated Technical Account Manager will:

1. Participate and act as an advisor on support cases as needed;
2. Be engaged during planned Customer events, such as: go-lives, upgrades, etc.

3. Interface with Hyland's Technical Support, Research and Development, Customer Success, Global Services, and Managed Services teams (as applicable);
4. Provide regular coaching (to be mutually defined by Customer and Hyland, but not to occur more than once weekly) on customer-specific solution configuration and software use;
5. Conduct a regular sync (to be mutually defined by Customer and Hyland, but not to occur more than once weekly), to review:
  - a. Summaries of work and tasks completed, upcoming work, known issues or risks; and
  - b. Technical Support case volume, statuses, prioritizing work for Hyland resources and updating deliverables based on estimated work effort; and
6. Other reporting details as requested, to provide clear communication paths and to summarize regular activities.

## Customer Success Manager

The Customer Success Manager will:

1. Be the primary point of contact to bring together the customer experience for health, adoption and value; working in tight concert with other Hyland departments along their journey
2. Conduct regular Business Reviews with customer
3. Create a Success Plan to support customer goals and objectives
4. Provide regular updates to customer, measuring and tracking against Success Plan;
5. Ensure customer is maximizing the value of Success Paths inclusions and their overall investment in Hyland

## Education and Training

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Premium Subscription. Access to either: (a) Hyland's on-demand Premium-based web learning content which can be used by anyone in Customer's organization; or (b) Alfresco Passport for 3 users, as applicable.

Training Discounts. Customer will receive the discounts, based on corresponding Success Path, for Hyland training courses purchased by Customer (to the extent training courses are available for the Product).

Hyland University Instructor Led Training. Hyland will provide the number of passes for Hyland University Instructor Led Training courses, based on the current Success Path purchased by Customer, once per twelve-month period.

CommunityLIVE General Conference Passes. Hyland will provide the number of passes for the CommunityLIVE General Conference, based on the current Success Path purchased by Customer, once per twelve-month period. If the Effective Date of the Success Path Schedule is within 60 days of the CommunityLIVE General Conference, the passes will be for the next year's conference.



TechQuest Passes. Hyland will provide the number of passes for a Hyland TechQuest conference, based on the current Success Path purchased by Customer, once per twelve month-period.

Expert Coaching. Each Expert Coaching option, identified in the list below, selected by Customer will be delivered up to once per twelve month-period. Coaching options that were not completed during a given twelve month-period will not rollover to subsequent twelve-month periods. Hyland's ability to provide Expert Coaching is dependent on Customer's reasonable efforts assisting Hyland in scheduling, preparing for, and conducting the Expert Coaching.

- Strategic Governance Coaching
- Platform Growth Coaching
- System Performance Coaching
- Upgrade and Release Planning Coaching

*Strategic Governance Coaching.* Examination and analysis of Customer's content services. Strategic Governance Coaching includes the following six core components: (a) Capture, (b) Manage, (c) Access, (d) Integrate, (e) Measure, and (f) Store. Strategic Governance coaching also includes the following:

1. Documenting the overall purpose, scope, and desired outcomes for Customer's Product;
2. Leads a thorough analysis of existing configuration;
3. Technical roadmap, which includes a summary of coaching discussions for Customer to create awareness and transparency for recommended governance and strategy efforts in the near-term;
4. Summary of findings, which may include strengths, weaknesses, opportunities, and threats to the current implementation; and
5. Proposed plan to implement the recommended changes.

*Platform Growth Coaching.* Review of Customer's current Product with respect to overall platform growth. Platform Growth Coaching includes the following:

1. Communicate future Software development releases and their impact on Customer's Product;
2. Assist Customer in preparing for software releases and features based on use and opportunity;
3. Identify potential opportunity for solution and platform expansion; and
4. Develop a plan for sizing appropriately based on growth, infrastructure, administration, staffing and training.

*System Performance Coaching.* Review and recommendations with respect to Customer's overall system performance. System Performance Coaching includes the following:

1. Defining the key performance metrics that will be used to evaluate the Product, which may

- include items such as response time, system uptime and document retrieval speed;
2. Capturing system performance data of a specified period of time to properly assess key performance metrics;
  3. Analyze the collected data to review performance;
  4. Perform an evaluation of the various components of the Product where performance may need remediation, this may include items such as servers, infrastructure, database, network and/or software configuration;
  5. Specific areas where performance may include as follows:
    - a. Changes and recommendations to software, network, configuration and/or other components;
    - b. Resource estimates, requirements, and plan to implement the recommended changes;
    - c. Known risks and challenges with implementing and/or not remediating performance issues;
    - d. Establishing a process for ongoing monitoring of system performance; and
    - e. Executive summary of performance review findings for the benefit of key stakeholders.

*Upgrade and Release Planning Coaching.* Review and recommendations for evaluating the current Product version deployment. Upgrade and Release Planning Coaching includes the following:

1. The proposed benefits and/or limitations based on the current version in use by Customer;
2. Detailing a plan for upgrading, including: hardware, software, network requirements, infrastructure upgrades, potential system downtime, data migration, end-user training, costs, and other items;
3. Developing a detailed plan for testing and validation to ensure the upgraded Product functions as expected.
4. Define path for data migration (where applicable) from version to version, to ensure data integrity and compatibility during the migration process;
5. Identify any customizations and/or integrations that may require changes as a result of any such upgrade;
6. Proposed training plan for end users to address any change management due to an upgrade; and
7. Create a contingency plan in the event of unforeseen complications during an upgrade to revert to previous version(s), if necessary.