

Captiva InputAccel 6.0

Initial Deployment Program Overview and Participant Requirements

1. Introduction

This document provides an overview of, and requirements for participation in the EMC Captiva InputAccel 6.0 Initial Deployment Program (IA6 IDP). We are seeking current EMC customers and partners who will actively participate in the IDP. The qualified participants must be planning an upgrade deployment based on the InputAccel 6.0 product release.

In addition to gaining the assistance of a cross organizational EMC Captiva team, you will have input into the direction of future InputAccel releases. Participants will be asked to provide specific deliverables and feedback throughout the duration of the program to ensure successful deployments within the timeline of the program.

After the successful completion of the IDP, you will be asked to fill out surveys so we can determine how well your goals and expectations were met for your deployment.

Please review the requirements and IDP schedule contained in this document. If you wish to participate, **continue to REGISTRATION** at the end of this document.

The program application **deadline is June 21, 2008**. The participant **selection will be finalized by June 30, 2008**. If you have any questions regarding this overview and/or the IDP, please contact the IA6 IDP Program Manager, Anna Bastardo (bastardo_anna@emc.com) at (925) 600-6980 or the IA6 Product Manager, Justin Bettencourt (bettencourt_justin@emc.com) at (408) 441-2242.

2. Product Overview

EMC Captiva InputAccel/ enables you to capture information from most paper or electronic sources, transform it into digital content, and deliver it into back-end systems. By helping your business reduce or completely eliminate manual data entry, InputAccel/ minimizes processing errors, improves data accuracy, and boosts productivity.

With InputAccel/, you also prepare your business for future growth with server configurations that scale to large enterprise installations with multiple servers. These high-availability configurations ensure that if one of your servers goes offline, others will continue to operate, protecting your work in progress and eliminating downtime.

InputAccel 6.0 Key Highlights:

- Module enhancements - ScanPlus, IndexPlus, Administration Console (AC), NuanceOCR (formerly ScanSoft), PrimeOCR, Documentum Export, Web Service In/Out, Image Divider, and Client-Side Scripting
- Improved Distributed Attended Module (Scan & Index) interfaces

- Simplified Administration through web-based console
- Integrated reporting capabilities
- High Availability within a Microsoft Active/Active cluster environment

Dispatcher 6.0 Key Highlights:

- InputAccel compatibility improvements
- InputAccel for Invoices compatibility improvements
- Enhanced third party recognition engine support
 - ⇒ Recognition of CAR, LAR, MICR/CMC7 codeline, signature presence, payee name, check number, and check date
 - ⇒ Scansoft OCR engine updated to version 15.1
 - ⇒ Standard and premium 1D and 2D barcode recognition engines
- Validation and Classification Edit interface enhancements
- Performance enhancements
- Third party product compatibility updates

3. Initial Deployment Program Overview

The primary goal of this program is to enable EMC customers and partners to accelerate their InputAccel 6.0 and or Dispatcher 6.0 upgrade deployments. A secondary goal is to provide feedback into Engineering and Product Management for product enhancements to quality and functionality, as well as to generate references.

In order to achieve these goals, EMC is providing the following:

- An IDP team dedicated to support participants
- A 'Rapid Response' window during which a team of Product and Support Engineers will provide quick turnaround for deployment questions, issues and where necessary, hot fixes for defects in the products reported during the program.
- Program-specific EMC offerings to provide enhanced training and technical support.

Participation in reference activities will be requested upon the completion of a successful deployment. The planned deployment must have a scope and timeline that falls from November 2008 – April 2009.

There is no cost to participate in this program, other than the participants' own cost for software and their deployment activities.

IDP Tiers

There are four tiers of participation. The tiers correspond to the level of participant commitment, support levels received from EMC, and resources required to ensure successful deployments.

Premier Tier

- Limited to a small number of highly qualified participants
- Deployment closely meets the criteria and deployment window as outlined in this application
- Participants agree to all activities and deliverables outlined in this application. Ability to provide reference activities upon a successful deployment is highly desirable, and will be taken into consideration during the selection process.

This tier receives:

- Highest level of support from the EMC IDP team for Support service requests and issues logged
- High priority in meetings
- eRoom peer collaboration

Standard Tier

- Limited number of participants, but greater number than in the Premier Tier
- Deployment generally meets the criteria and deployment window outlined in this application
- Participants strongly encouraged to participate in the activities and deliverables outlined in this application

This tier receives:

- Support from the EMC team after Premier Tier commitment has been fulfilled, if necessary to differentiate. (Historically, it has not been an issue for the EMC team to support both Premier and Standard tiers at an equally high level of responsiveness.)
- Participation in IDP meetings with the ability to engage in discussions only as time permits

- eRoom peer collaboration

Partner Tier

- Open to technology partners and systems integrators not actively working with a customer on an InputAccel deployment

This tier receives:

- Support from EMC team after commitment to Premier and Standard tiers has been met
- eRoom peer collaboration

Read-Only Tier

- Undefined number of participants
- Includes customers and partners who are minimally qualified but would gain benefit from participation in the IDP
- Participants do not need to agree to all the activities and deliverables outlined in this application

This tier receives:

- Read-only access to the eRoom, including the Issue Tracker
- Access to program activities (meetings, trainings)

Participant Requirements

- Participants must be existing customers, partners or EMC employees
- Participants must have an existing 5.3 InputAccel and/or Dispatcher production environment
- The targeted application must accommodate a **critical** business need
- Customer management **must support** the program
- Goals for the deployment must be clearly established
- Participants must meet the time, budget and resource commitments
- Participants must ensure that the features and functionality planned for their deployment can be accommodated by the InputAccel 6.0 release.
- Participants must have sufficient experience with InputAccel products
- Participants must identify an EMC champion within their organization

- The deployment must have a clearly defined plan and scope to be completed prior to program execution
- Participants must agree to complete evaluation surveys at the end of the program
- Participants must agree to reference requirements as outlined in this agreement

Participant Goals and Benefits

The results from the IDP will affect future product planning. A service pack release of InputAccel is targeted for end of Q1 2009 that will include input arising from the IA6 IDP. This section defines the goals and benefits for IDP participants:

- Accelerated upgrade deployments of IA6 applications
- Direct support from a comprehensive EMC team during the deployment
- Reduced time and, therefore, cost to deploy
- Direct feedback into EMC to influence future products, documentation, training and services
- Development of repeatable, scalable success formulas for future EMC deployments

The IDP will help ensure these benefits in the following ways:

- An eRoom will be provided to:
 - ⇒ Provide peer collaboration
 - ⇒ Provide on-line collaboration between participants and the IDP team
- The eRoom will be moderated by the Customer Deployability Program Manager
- The IDP team will consist of key members of:
 - ⇒ Product Operations
 - ⇒ Product Management
 - ⇒ Support Services
 - ⇒ Education Services
 - ⇒ Program Management
- IDP meetings via conference call will be held between participants and the IDP team

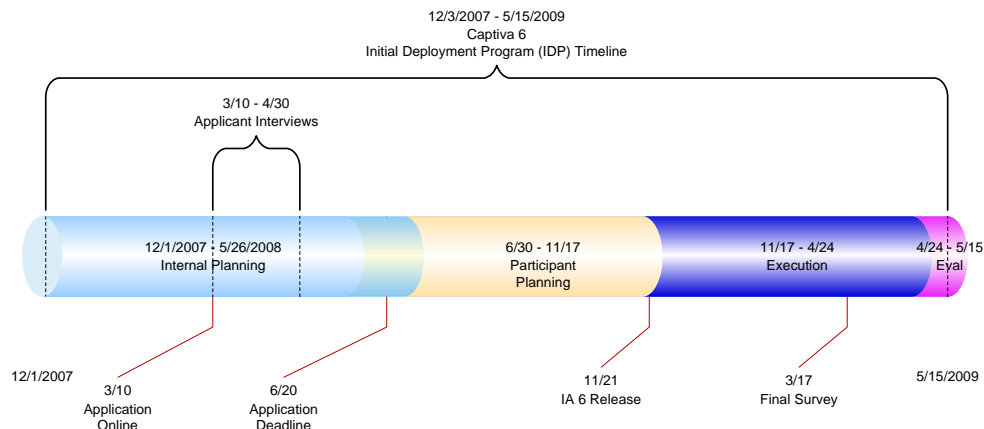
- ⇒ Planning meetings will be scheduled as required
 - ⇒ An IDP kickoff meeting will be held just prior to program execution
 - ⇒ Weekly meetings will be held throughout the Execution phase of the program (July 2008 – November 2008)
- Regular polls and surveys will be taken to ensure your successful deployment

EMC Goals and Benefits

- Obtain feedback into Product Operations: product quality, functionality & usability
- Incorporate defect feedback into subsequent releases
- Incorporate feature feedback into subsequent releases
- Obtain customer references upon successful upgrade deployments

Timeline

The IA6 IDP will run for a period of approximately 10 months. This is a high-level schedule of the IDP. The dates listed are subject to change.



4. IDP Activities

Planning Activities:

During the deployment planning, EMC will provide:

- Assistance and tools in planning for upgrades of IA6 products

- An IA6 IDP eRoom to:
 - ⇒ Monitor questions and issues
 - ⇒ Provide peer collaboration

During the planning phase, participants will provide the following information regarding their planned IA6 upgrade:

- Upgrade overview
- Schedule, including major milestone dates
- Target deployment environment, including:
 - ⇒ Client and server platforms and OS versions
 - ⇒ EMC Captiva products and versions
 - ⇒ EMC Documentum products and versions
 - ⇒ Non-EMC Integrated products / versions
- Attend planning meetings when required

Execution Activities:

Deployment execution is targeted for November 17, 2008. The **IA6 IDP eRoom** will be used for all general activities including:

- Collaborate with the IA6 IDP team and other participants
- Provide meeting information and product information
- Tracking of support cases for showstopper/blocking issues in the eRoom Issue Tracker
- Participate in polls and surveys

Weekly meetings will be held. The day and time will be confirmed at a later date.

Participants will:

- Attend weekly meetings to discuss upgrade status and any blocking issues
- Submit weekly status reports one day prior to the weekly meeting to allow the IA6 IDP team to research any issues that may be discussed in the meeting

- Report on deployment/evaluation milestones

Participants will follow the process below for **case and bug tracking**:

- Participants will log cases on the Support website for all potential product defects, technical questions and feature requests
 - ⇒ If a logged case is deemed to be a blocking issue, e.g., impediment to upgrade, participants will log the case in eRoom Issue Tracker
 - ⇒ If the blocking issue is urgent, participants may contact the Customer Deployability Program Manager directly to expedite resolution.
 - ⇒ The IA6 IDP team will review each blocking issue and work with participants toward resolution

Rapid Response Window

The window for rapid response will be a 5 month window during program execution (November 17, 2008 – April 24, 2009). During this window, EMC will provide Support and Product Engineers to:

- Reproduce and fix showstopper bugs
- Provide hot fixes where necessary

Evaluation Activities:

During the evaluation phase, which will begin April 25, 2009, participants will:

- Complete a final survey that will include feedback on:
 - ⇒ Product quality and deployability
 - ⇒ Benefits of program
 - ⇒ Prioritization of feature requests
 - ⇒ Success of your upgrade or deployment
- Perform the **reference activities** agreed to in the submitted application
- If a service pack is required to resolve issues, participants will upgrade their deployment to those releases when they become available

5. Joint Commitment

To ensure a successful program, the schedule must be executed in a correct and timely manner. This requires a commitment from all IDP participants, including the EMC IDP team, customers, technology partners, and system integrators.

EMC Commitment

EMC will provide an IA6 IDP team. The EMC IDP team is comprised of members of various organizations dedicated to work with participants toward successful deployments. The level of commitment varies with the role played on the team. The roles and responsibilities are outlined below:

Role	Responsibility
Customer Deployability Program Manager	<ul style="list-style-type: none"> ⇒ Manage IDP program and schedule ⇒ Primary liaison with customers ⇒ Ensure participant questions and issues are addressed ⇒ Develop and present surveys and final reports
Product Manager	<ul style="list-style-type: none"> ⇒ Primary contact for IA6 features and functionality
Support Services	<ul style="list-style-type: none"> ⇒ Be the first level of support for cases/issues ⇒ Work with Engineering to quickly resolve blocking issues ⇒ Submit bugs/feature requests/patch requests
Engineering	<ul style="list-style-type: none"> ⇒ Primary contact for product technical functionality ⇒ Work with the Support team to resolve cases reported by IDP participants ⇒ Available for feedback during the weekly IDP conference calls with participants ⇒ Provide supplemental support where IA6 documentation may be lacking
Quality Assurance	<ul style="list-style-type: none"> ⇒ Validate execution scenario schedule

Role	Responsibility
	<ul style="list-style-type: none"> ⇒ Validate site specific test scenarios ⇒ Available for feedback during the weekly IDP conference calls with participants ⇒ Provide supplemental support in conjunction with Engineering
Performance Engineering	<ul style="list-style-type: none"> ⇒ Primary contact for performance effectiveness ⇒ Gather information on performance statistics ⇒ Incorporate feedback into future configuration and sizing guidelines
Technical Publications	<ul style="list-style-type: none"> ⇒ Deliver FCS product documentation for deployment execution ⇒ Available for feedback during the weekly IDP conference calls with participants ⇒ Incorporate customer feedback on documentation into the future releases of products.
Additional members: <ul style="list-style-type: none"> • Product Marketing • Program Management • Reference Team • Consulting • Training 	<ul style="list-style-type: none"> ⇒ Participate in weekly IDP conference calls ⇒ Monitor the collaborative environment and ensure customer questions and issues are addressed

IDP Participant Commitment

Participants will be responsible for the following activities before, during and after the IDP:

Planning

- Define site specific goals
- Prepare IDP sites
 - ⇒ Site locations

⇒ Set up hardware and communications

- Develop site specific test scenarios
- Update functionality checklist based on test scenarios
- Develop site specific execution plan, including milestones and timelines
- Ensure site is ready for deployment

Execution

- Execute site specific scenarios and report results
- Ensure that tests are executed within designated schedule
- Ensure that tests are prioritized to ensure that the highest priorities are completed within the execution period
- Log all cases, feature requests and product defects through Support organization
- Escalate showstopper bugs and issues to the IDP Program Manager
- Provide weekly status reports
- Participate in weekly conference calls

Evaluation

- Complete surveys
- Fulfill agreed upon reference requirements

Reference Requirements

Participants whose program work results in satisfactory deployments are strongly encouraged to engage in one or more reference activities, which are coordinated by our “Studio E” Customer Leverage group. Points awarded within the Studio E program can be redeemed for special benefits, such as passes to the EMC World conferences, training credits, gift items, or donations to various charities. ***Preference in applicant selection will be given to those most able to commit to reference participation activities.***

Below is a sampling of various reference activities, by increase in effort level:

- Company name/logo usage
- Customer quote
- PowerPoint slide usage in presentations
- Analyst reference calls

- Press releases
- Sales reference calls
- Product Advisory Forum participation
- Conference presentations
- Success stories
- Hosting customer site visits
- Case studies
- Advertisement/brochure participation

Please go to <https://studioe.emc.com/> for more information about the Studio E program.

Minimum Requirements for Continued Participation

It is expected that requests for participation in the IDP will exceed what can be adequately supported in the program. **Submission of this application does not guarantee your selection or involvement.**

Subsequent to IDP participant selection, EMC reserves the right to drop any participant from the program who does not meet the following minimum requirements at any time during the program:

- Dedicate sufficient resources to accomplish program specific goals
- Provide the appropriate site, hardware and software requirements
- Attend all conference calls, or, if extenuating circumstances prevent this, the participant must provide an updated status of their test results.

To register for the **EMC IA6 Initial Deployment Program**, click on the link below. Upon registration, an application will then be sent to you.

<http://www.emcsurveys.com/se.ashx?s=5A1E27D22CC62DCA>