

# Adept Cloud – Services Catalog

## Operational Responsibilities & Implementation Services

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## 1. Shared Responsibility Model

Adept Cloud operates under a shared responsibility model. Synergis is responsible for the platform's security, availability, and operation. Customers are responsible for configuration, user and access management, workflows, and all data stored within the system.

| Area                             | Synergis Responsibilities                                                                                                                                                                                                                                                                                    | Customer Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Platform</b>                  | <ul style="list-style-type: none"><li>• Operate infrastructure, database, and storage</li><li>• Maintain availability, performance, and security</li><li>• Apply updates, patches, and enhancements</li></ul>                                                                                                | <ul style="list-style-type: none"><li>• Ensure users in Power User roles have current supported versions of all required client components (Task Pane, Viewer, and Client Services) installed on their workstations</li><li>• Use supported web browsers</li><li>• Maintain required network configurations, including open ports, to enable Adept Cloud connectivity</li><li>• Define internal usage policies and governance</li></ul> |
| <b>Assets</b>                    | <ul style="list-style-type: none"><li>• Provide vault architecture and system-driven indexing, performed automatically as part of platform operations</li><li>• Maintain storage for current and previous document versions</li><li>• Ensure system availability for document access and retrieval</li></ul> | <ul style="list-style-type: none"><li>• Retain ownership of all documents and associated metadata</li><li>• Create and manage library structure and organization</li><li>• Configure and maintain permissions and access controls</li><li>• Establish naming conventions, lifecycle states, and compliance requirements</li><li>• Ensure data accuracy and retention policies</li></ul>                                                 |
| <b>Users &amp; Groups</b>        | <ul style="list-style-type: none"><li>• Provide authentication and identity integration capabilities</li></ul>                                                                                                                                                                                               | <ul style="list-style-type: none"><li>• Manage user and group accounts</li><li>• Define and enforce access control policies</li><li>• Administer user lifecycle (provisioning, updates, deactivation)</li></ul>                                                                                                                                                                                                                         |
| <b>Metadata &amp; Data Cards</b> | <ul style="list-style-type: none"><li>• Create, update, and delete custom database fields and data cards</li></ul>                                                                                                                                                                                           | <ul style="list-style-type: none"><li>• Define custom database fields and data card design</li></ul>                                                                                                                                                                                                                                                                                                                                    |

| Area                                      | Synergis Responsibilities                                                                                                                                  | Customer Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                           |                                                                                                                                                            | <ul style="list-style-type: none"> <li>Establish and manage business rules governing metadata</li> </ul>                                                                                                                                                                                                                                                                                                                                |
| <b>Administration &amp; Configuration</b> | <ul style="list-style-type: none"> <li>Perform database maintenance and system-level operations required for platform stability and performance</li> </ul> | <ul style="list-style-type: none"> <li>Own and manage all administrative configuration within Adept Cloud</li> <li>Design and maintain workflows and approval processes</li> <li>Ensure accuracy and integrity of business logic and system behavior</li> <li>Configure and maintain system settings, notifications, and rules</li> <li>Perform all configuration and troubleshooting through supported user interface tools</li> </ul> |

## 2. Onboarding Services for New Adept Cloud Customers

Synergis offers three Onboarding Packages for implementation services for new customers that coincide with the Adept Cloud software plan – Essentials, Professional and Enterprise. The tables below summarize what is included in each.

### 2a. Configuration Scope by Package

The following items are configured by Synergis with customer participation during onboarding. All configuration assumes no custom data migration is required unless otherwise noted.

| Configuration Item                             | Essentials             | Professional           | Enterprise             |
|------------------------------------------------|------------------------|------------------------|------------------------|
| <b>Custom Database Fields</b>                  | Up to 30               | Up to 40               | Up to 60               |
| <b>Data Cards (2 tabs each)</b>                | Up to 1                | Up to 4                | Up to 6                |
| <b>Libraries Synchronized</b>                  | Up to 15               | Up to 30               | Up to 60               |
| <b>Documents Vaulted*</b>                      | Up to 25,000           | Up to 50,000           | Up to 200,000          |
| <b>Metadata Fields Imported</b>                | Up to 10               | Up to 20               | Up to 30               |
| <b>User Accounts Configured</b>                | Up to 10               | Up to 20               | Up to 40               |
| <b>Groups Configured</b>                       | Up to 5                | Up to 10               | Up to 15               |
| <b>Library Rights Assigned</b>                 | Up to 15 libs          | Up to 15 libs          | Up to 15 libs          |
| <b>Required Fields per Library</b>             | Up to 2 libs           | Up to 4 libs           | Up to 6 libs           |
| <b>FileGuide Views</b>                         | Up to 2                | Up to 6                | Up to 8                |
| <b>Restricted Lists</b>                        | Up to 5                | Up to 10               | Up to 15               |
| <b>Protected Fields</b>                        | Up to 10               | Up to 15               | Up to 20               |
| <b>Related Fields</b>                          | Up to 2                | Up to 5                | Up to 10               |
| <b>Document Extract Fields (CAD + non-CAD)</b> | Up to 10 each          | Up to 30 each          | Up to 50 each          |
| <b>Workflows Configured</b>                    | Up to 1 (3 steps each) | Up to 3 (3 steps each) | Up to 5 (3 steps each) |
| <b>AutoName Configurations</b>                 | Up to 1                | Up to 5                | Up to 10               |

*\*Document vaulting assumes no custom data migration.*

## 2b. Included Training Sessions

| Training Session                                      | Essentials | Professional | Enterprise |
|-------------------------------------------------------|------------|--------------|------------|
| <b>Administrator Training (up to 8 participants)</b>  | 1 session  | 1 session    | 1 session  |
| <b>Power User Training (up to 30 participants)</b>    | 1 session  | 1 session    | 1 session  |
| <b>Lite User Training (up to 30 participants)</b>     | 1 session  | 1 session    | 1 session  |
| <b>CAD Task Pane Training (up to 20 participants)</b> | 1 session  | 1 session    | 1 session  |

## 2c Onboarding Process & Responsibilities for New Adept Cloud Customers

All new customer packages (Essentials, Professional, Enterprise) follow the same general onboarding process. The tables below outline responsibilities by phase. Specific limits vary by plan (see Section 2a).

| Synergis Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Customer Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| <ul style="list-style-type: none"> <li>Deliver Administrator Training (up to 8 participants)</li> <li>Conduct discovery sessions: review and complete configuration worksheet; define implementation goals and initial value metrics</li> <li>Configure database fields, data cards, and libraries per package limits</li> <li>Vault documents per package limits (assumes no custom data migration)</li> <li>Import metadata fields from customer-provided Excel spreadsheet</li> <li>Load prepared vault and database into Adept Cloud environment</li> <li>Support Single Sign-On (SSO) configuration</li> <li>Support Directory Services setup (if applicable)</li> <li>Provide guided configuration for users, groups, libraries, metadata, and workflows (per package limits)</li> <li>Configure Adept Templates Library</li> <li>Deliver all included training sessions</li> <li>Update configuration document (Enterprise and Professional only)</li> <li>Perform secure data destruction from staging environment upon completion</li> </ul> | <ul style="list-style-type: none"> <li>Ensure at least one participant attends Administrator Training</li> <li>Participate in discovery sessions: complete and provide configuration worksheet; define implementation goals and initial value metrics</li> <li>Perform document preparation and cleanup as defined during discovery</li> <li>Compress and upload documents to Synergis secure staging location (per package limits)</li> <li>Provide Excel spreadsheet with document metadata, if applicable</li> <li>Designate an IT resource for initial login and SSO configuration (requires Identity Provider access)</li> <li>Provide SSO data (OpenID Connect) and domain information for user/group sync</li> <li>Complete configuration with Synergis guidance (users, groups, libraries, metadata, workflows, etc. per package limits)</li> <li>Set up Adept Templates Library</li> <li>Ensure required staff attend all training sessions</li> </ul> |

## 2d. General Terms and Notes

- All Onboarding Services are delivered remotely unless otherwise agreed in writing.
- Configuration limits defined in Section 2a represent the maximum included scope. Work exceeding these limits may be available for additional fees.
- Customers are responsible for providing accurate data, timely decisions, and designated staff participation throughout the implementation process.
- Synergis will perform secure destruction of all customer data from the staging environment upon completion of implementation.
- SSO configuration supports OpenID Connect (OIDC) only.

- Directory Services synchronization is supported where applicable; Customer must provide domain information.

### 3. Transition Services for Adept On-Premise (11.x) Customers Moving to Adept Cloud

For existing Adept on-premise (11.x) customers transitioning to Adept Cloud, we offer Transition Services to migrate your Adept environment to Adept Cloud and get you onboarded to a live, production environment.

#### 3a. Onboarding Process & Responsibilities for Adept On-Premise (11.x) Customers Transitioning to Adept Cloud

| Synergis Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Customer Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
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| <ul style="list-style-type: none"> <li>• Extract and normalize the Adept Vault for cloud compatibility</li> <li>• Perform Full-Text Search (FTS) reindexing (up to 40,000 docs or 5 libraries)</li> <li>• Support resolution of up to 50 user accounts</li> <li>• Upgrade Adept Databases to Adept Cloud format</li> <li>• Load prepared vault and database into Adept Cloud environment</li> <li>• Support Single Sign-On (SSO) configuration</li> <li>• Support Directory Services setup (if applicable)</li> <li>• Support setup of the Adept Templates Library</li> <li>• Deliver one (1) Administrator Update Training session for up to 8 existing administrators</li> <li>• Deliver one (1) Power User and Lite User Training session for up to 30 existing Adept users</li> <li>• Deliver one (1) Supported CAD Task Pane Training session for up to 20 existing Task Pane users</li> <li>• Perform secure destruction of customer data from staging environment upon completion</li> </ul> | <ul style="list-style-type: none"> <li>• Designate a user for initial login and SSO configuration (typically an IT resource with appropriate Identity Provider access)</li> <li>• Resolve any duplicate user accounts, including those with duplicate email addresses</li> <li>• Restore Audit Trail Archive (if applicable)</li> <li>• Extract all active Templates and check them into the Templates Library</li> <li>• Ensure all documents are checked in and approved prior to transition</li> <li>• Validate user license assignment</li> <li>• Set Adept System to Read-Only to prevent changes during transition</li> <li>• Compress and upload Adept Vaults to Synergis secure staging location</li> <li>• Upload existing Adept Database to Synergis secure staging location</li> <li>• Provide required data for SSO configuration (OpenID Connect only)</li> <li>• Provide domain information to synchronize users and groups (if applicable)</li> <li>• Complete setup of Adept Templates Library</li> </ul> |

#### 3b. General Terms and Notes

- All Transition Services are delivered remotely unless otherwise agreed in writing.
- Configuration limits defined in Section 3a represent the maximum included scope. Work exceeding these limits may be available for additional fees.
- Customers are responsible for providing accurate data, timely decisions, and designated staff participation throughout the implementation process.
- Synergis will perform secure destruction of all customer data from the staging environment upon completion of transition.
- SSO configuration supports OpenID Connect (OIDC) only.
- Directory Services synchronization is supported where applicable; Customer must provide domain information.

### 4. Ongoing Technical Consulting Services

## 4a. Responsibilities

| Synergis Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Customer Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| <ul style="list-style-type: none"> <li>Synergis will assign a Customer Success Manager (“CSM”) to these services. This CSM will be the main point of contact and the main technical resource for Customer for the term of the services.</li> <li>At the start of the services, the assigned CSM and a Project Manager and/or the Technical Director will meet with Customer for a kickoff call. The purpose of this call is to: <ul style="list-style-type: none"> <li>Introduce Customer and CSM to each other.</li> <li>Begin to formulate a preliminary plan for the work to be done under this Agreement.</li> <li>Discuss and agree with communication and engagement processes.</li> <li>Agree on a schedule and meeting invites will be sent for agreed upon schedule.</li> </ul> </li> <li>The following is a list of the possible project work that could be provided with these services. This is not an all-inclusive list and is provided as an example of projects that could be done. The CSM and Customer must collaborate and agree on the services provided on a month-to-month basis. <ul style="list-style-type: none"> <li>Integrating new groups of users</li> <li>Advanced software usage</li> <li>Training new end users</li> <li>User adoption strategies</li> <li>New feature/functionality setup and rollout</li> <li>Process improvement</li> <li>Workflow design</li> <li>CAD integration best practices</li> <li>System health optimization</li> <li>Performance optimization</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>Resource(s) from the Customer (“Customer Representative”) must be identified and assigned to work with the CSM for the duration of these services.</li> <li>The Customer Representative is to be named at the kickoff call.</li> <li>Reasonable availability and response time is required from Customer Representative as needed by CSM when resolving or working on a service-related task, incident, or request.</li> <li>Provide the CSM with the necessary access and rights to the Adept system, network, resources, etc. as needed.</li> </ul> |

## 4b. General Terms and Notes

- The CSM will only work up to the maximum number of hours per month as designated in the corresponding sales proposal.
- The CSM will work normal business hours: 8:30AM to 5:30PM Eastern Time on Monday through Friday, or an alternate timeframe that is mutually agreed upon by both Synergis and Customer.
  - Requests for work to be performed that are required to be done outside of the normal business hours stated above (e.g., nights, weekends) are not included as part of these services. Should such work be necessary, the CSM and their Technical Director will evaluate the need on a case-by-case basis. Additional fees may apply.
- These services will be provided remotely via phone, email, and online web-based meeting applications such as Zoom.
- The CSM will not be available to Customer for services outside of the contracted number of hours per month as defined in the corresponding sales proposal.
- The CSM, along with Synergis management, will decide if services requested by Customer fall outside the scope of these services. If it is decided by Synergis that the request is out of scope, the request will be treated as a separate project, and a Statement of Work will be created and additional fees will apply.
- CSM and Customer must regularly communicate about the upcoming tasks monthly.

- Throughout the term of these services, from time to time, the CSM will be unavailable due to Synergis company holiday schedule at which time the office is closed, scheduled Paid Time Off (i.e., vacation and personal time), unscheduled sick time, etc.
  - The CSM will communicate these instances to Customer as far ahead of time as possible.
  - If it is deemed necessary by Synergis and Customer, Synergis will make all possible efforts to replace the assigned CSM with another to limit the interruption of the ongoing work as much as possible.

## 5. Remote Administration Services

### 5a. Responsibilities

| Synergis Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Customer Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| <ul style="list-style-type: none"> <li>Synergis will assign a Customer Success Manager (“CSM”) to these services. This CSM will be the main point of contact and the main technical resource for Customer for the term of the services.</li> <li>At the start of the services, the assigned CSM and a Project Manager and/or the Technical Director will meet with Customer for a kickoff call. The purpose of this call is to:               <ul style="list-style-type: none"> <li>Introduce Customer and CSM to each other.</li> <li>Begin to formulate a preliminary plan for the work to be done under this Agreement.</li> <li>Discuss and agree with communication and engagement processes.</li> </ul> </li> <li>The following is a list of the possible project work that could be provided with these services. This is not an all-inclusive list and is provided as an example of projects that could be done. The CSM and Customer must collaborate and agree on the services provided on a week-to-week basis.               <ul style="list-style-type: none"> <li>System Configuration items such as but not limited to Vault setup, data card creation, user management, group management, library management, FileGuide view creation, permission management, workflow editing and creation, transmittal design, plug-in use, shared work areas, etc.</li> <li>User training</li> <li>Best practice deployment</li> <li>Software upgrades</li> <li>New feature configuration and rollout</li> <li>CAD and MS Office application integration</li> <li>Initial troubleshooting of user issues</li> <li>Database maintenance</li> <li>System maintenance and updates</li> <li>Backup verification</li> <li>Replicated environment creation</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>Resource(s) from the Customer (“Customer Representative”) must be identified and assigned to work with the CSM for the duration of the contract.</li> <li>The Customer Representative is to be named at the kickoff call.</li> <li>Reasonable availability and response time from Customer Representative as needed by CSM when resolving or working on a service-related task, incident, or request.</li> <li>Provide the CSM with the necessary access and rights to the Adept system, network, resources, etc. as needed.</li> </ul> |

### 5b. General Terms and Notes

- The CSM will only work up to the maximum number of hours per week as designated in the corresponding sales proposal.

- The CSM will work normal business hours: 8:30AM to 5:30PM Eastern Time on Monday through Friday, or an alternate timeframe that is mutually agreed upon by both Synergis and Customer.
  - Requests for work to be performed that are required to be done outside of the normal business hours stated above (e.g., nights, weekends) are not included as part of these services. Should such work be necessary, the CSM and their Technical Director will evaluate the need on a case-by-case basis. Additional fees may apply.
- These services will be provided remotely via phone, email, and online web-based meeting applications such as Zoom.
- The CSM will not be available to Customer for services outside of the contracted number of hours per week as defined in the corresponding sales proposal.
- The CSM, along with Synergis management, will decide if services requested by Customer fall outside the scope of these services. If it is decided by Synergis that the request is out of scope, the request will be treated as a separate project, and a Statement of Work will be created and additional fees will apply.
- CSM and Customer must regularly communicate about the upcoming tasks weekly.
- Throughout the term of these services, from time to time, the CSM will be unavailable due to Synergis company holiday schedule at which time the office is closed, scheduled Paid Time Off (i.e., vacation and personal time), unscheduled sick time, etc.
  - The CSM will communicate these instances to Customer as far ahead of time as possible.
  - If it is deemed necessary by Synergis and Customer, Synergis will make all possible efforts to replace the assigned CSM with another to limit the interruption of the ongoing work as much as possible.