



DOCUMOTO GUIDELINE

UNDERSTANDING DOCUMOTO RELEASES & CHANGE MANAGEMENT

We have prepared this guide to help our customers understand how and when Documoto releases software, how we provide support for software changes, what notice can be expected, and how we manage and schedule downtime.

One of the compelling advantages of a SaaS (Software as a Service) platform such as Documoto is the capability to rapidly and frequently push software improvements and fixes into Production, often with little or no downtime. Our software engineering team utilizes state-of-the-art development practices to update our SaaS software as often as needed in order to provide the best possible experience for our customers.

Since we are a SaaS platform serving many different customers on the same system, it is impossible to coordinate our release activities with any specific customer. However, we realize that Documoto is a critical business system for our customers, used internally and often throughout their sales channel and user community. Our customers must have sufficient time and support to prepare their organization for any significant changes in Documoto.

This becomes a bit of balancing act, where we seek to preserve our ability to maintain, extend, improve, operate and repair Documoto for all of our customers, while ensuring we provide sufficient notification and support to our customers and their change management activities. This guide should help you understand how we achieve that balance.

TERMINOLOGY

In order to make use of the concepts and terms in this guide, the following definitions are provided below.

- ✓ **Deployment:** Any distribution of new or updated software, hardware, settings, configuration, applications, supporting systems, utilities, or other artifacts, whether owned by Documoto or by any third party, into any environment. Deployments can occur at any time, in any environment, at the discretion of Documoto.
- ✓ **Release:** Any deployment, or activation of any previous deployment, into the Production environment that has at least some level of customer impact. A release to a customer can occur at deployment time, or after a deployment, depending on configuration settings and feature flags. A release may or may not have change management impact.
- ✓ **Change Management:** The process by which our customers prepare their people, customers, channel, partners, processes, and technology to successfully adopt, manage and benefit from change imposed on them by Documoto releases.
- ✓ **Configuration Setting:** A mechanism by which a software capability, UI element, feature, module or system can be activated or deactivated by a customer or Documoto, independently of any deployment. When a configuration setting is on/enabled, the feature, module or system is available/visible to a customer. When a configuration setting is off/disabled, the feature, module or system is not available/visible to a customer.
- ✓ **Feature Flag:** A mechanism by which a software capability, UI element, feature, module or system can be activated or deactivated by Documoto, independently of any deployment. When a feature flag is on/enabled, the feature, module or system is available/visible to a customer, subject to other considerations such as licensing. When a feature flag is off/disabled, the feature, module or system is not available/visible to a customer.
- ✓ **Release Notes:** A document or artifact that itemizes certain changes made in a release that may impact customers. Changes are documented at the sole discretion of Documoto, including but not limited to factors such as: amount of customer impact, breadth of change across the Documoto customer community, disclosure of confidential information, disclosure of adverse or disparaging information, disclosure of trade secrets, or disclosure of techniques or issues that could be used to breach security or access. Release notes will be provided with every release and in ways such as through email, automated systems, in-app notifications, trust sites, or other mechanisms that Documoto may choose to use.
- ✓ **Status Notification:** An automated or manual notice, either through email to Documoto administrators or via a subscription to an on-line notification service, that provides advance notification of releases, notification of an in-progress release, and notification that a release has been completed.

NEW DOCUMOTO FEATURES

New, previously unavailable Documoto functionality normally do not require any advance notifications or change management activities, so long as all the following are true:

- ✓ The new functionality is independent of any current functionality.
- ✓ Usage of the new functionality would not materially change or eliminate the usage of any existing functionality.
- ✓ The new functionality does not require immediate usage; it can be used or activated effectively at any point during or after when the new functionality is made available to customers.
- ✓ The new functionality can be appropriately supported by Documoto via mechanisms such as: email communications from Documoto, online help, knowledge base articles, in-app notifications and walkthroughs, and any other mechanisms that Documoto may offer.



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RELEASE CLASSIFICATION OF CHANGE MANAGEMENT IMPACT

We classify every release of Documoto as to its change management impact according to the following matrix. These determinations are made at the sole discretion of Documoto, taking into account the preponderance of considerations outlined below.

CM Impact Classification	Summary	UI and Training Considerations	Integration Considerations
Level 0: None	No change management required.	Minor UI changes; or Moderate changes that are appropriately covered by in-app walkthroughs, in-app notifications, or help.	No changes to integrations between Documoto and customer systems.
Level 1: Minor	Some minimal amount of change management required.	Moderate changes that are appropriately covered by in-app walkthroughs, in-app notifications, or help.	No changes to integrations between Documoto and the customer systems.
Level 2: Major	Significant changes to Documoto that will require a change management plan, timeline and execution, with appropriate advance notification from Documoto.	Moderate UI changes without walkthroughs, notifications or help. Minor changes to training materials. Advance notice to users not required. Email or website notice to users nominally sufficient.	Changes made in the release may impact customer integrations.

DOCUMOTO RELEASE AND CHANGE MANAGEMENT SUPPORT

Based on the classification of a release, Documoto provides the following notifications and support.

NORMAL RELEASE

CM Impact Classification	Documoto Change Management Support	Release Schedule	COMPANY Testing	Status Notification
Level 0: None	In-app notices, help updates, knowledge base articles, or other artifacts at Documoto's discretion.	If no downtime, anytime. If downtime, any day after 6PM MT.	None available.	No status notification if no downtime. If there is downtime, status notification 24 hours in advance, 1 hour in advance, upon start of downtime, upon end of downtime.
Level 1: Minor	In-app notices, help updates, knowledge base articles, or other artifacts at Documoto's discretion.	If no downtime, anytime. If downtime, any day after 6PM MT.	None available.	No status notification if no downtime. If there is downtime, status notification 48 hours in advance, 1 hour in advance, upon start of downtime, upon end of downtime.
Level 2: Major	In-app notices, help updates, knowledge base articles, or other artifacts at Documoto's discretion.	Weekdays after 6PM MT or on weekends.	A testing environment will be provided a minimum of 1 week, but typically at least 2 weeks, before production release.	Personal and ongoing communication between the customer and Documoto Customer Success Manager as soon as practical once release is planned. If no downtime, status notification of new or updated functionality following release. If there is downtime, status notification 1-2 weeks in advance, 48 hours in advance, 1 hour in advance, upon start of release, upon end of release.

PATCH RELEASE

A patch release is an expedited release of software due to an important update. A patch release will be managed as a Level 0 release.

EMERGENCY RELEASE

An emergency release is an unplanned release that requires immediate deployment into the Production environment. We reserve the right to make emergency releases as needed to protect the integrity of Documoto and its data, to solve or mitigate Sev-1 or Sev-2 issues, to prevent or eliminate any security or availability threats, or to mitigate any other issue that in Documoto's determination would jeopardize any Documoto customer or Documoto if allowed to continue.

An emergency release can occur at any time, with little or no notice, and will be performed only under exceptional circumstances with as little downtime as possible. Emergency releases will be reflected in the status notification system, during and after the release.