



## Installation Process Overview

Now that you have signed an agreement and are ready to begin the setup and deployment process, you are both excited to begin and wondering about what comes next. This document will cover the steps that Hudson will follow during the installation process. While this process will ultimately be adjusted to suit the specific needs of each client, this document outlines most all of the steps that will be taken by you and by Hudson system engineers, with perhaps slight variations in sequencing, to get you up and running in the shortest time possible. Our goal is to ensure an easy transition to Hudson systems by doing a comprehensive and thorough configuration, setup and training.

1. Client completes Discovery Document (basic company profile data)
2. Hudson assigns internal account manager
  - Primary liaison & point of contact to new client
  - Oversees and manages the installation / setup / configuration of Hudson systems
  - Recommends / up-sells additional modules and functionality (Web Reservations, FlightView, BlackBerry, Kiosk, peripherals, etc)
  - Schedules or conducts new client orientation sessions (HWeb Agent, Dispatcher, Invoicing, etc)
  - Serves as primary trainer to new client (following train-the-trainer methodology)
  - Client identifies their internal primary liaison and point of contact
3. Client submits fare records, policies & procedures, fees, charges, taxes, surcharges, etc: any/all documentation to Hudson Systems Engineering for thorough internal review. Potential questions requesting clarification are drafted.
4. Hudson interrogatory:
  - Thorough Review of current client operating philosophies and procedures (Reservation, Dispatch, Accounting)
  - Review of current system strengths (for retention if possible) and weaknesses (for correction)
  - Develop list of desired functionality
  - Identify potential areas requiring additional development prior to deployment
  - Determine client installation timeline expectations / requirements
    - Identify critical deadlines, if any (ex: current system failures, support contract expiration, etc.)
    - Specify primary client point of contact (prefer all communication through one or two individuals)
    - Specify client IT contact (if different from above)
  - Data export from current system? Formatting and translation required prior to import? Examine size and structure of exported data.
  - Review client payroll policies and procedures
    - Pay drivers or pay vehicles
    - Drivers as Employees
    - Drivers as Independent Operators
  - Invoicing and receivables policies and procedures

- Billing period
  - Invoice format / special templates
  - Invoice delivery method (printed, emailed, electronic, other)
5. Review client IT hardware and networking configuration – provide list of necessary updates required, if applicable.
  6. Basic application installation and setup on Hudson server, hosted server, client server, as appropriate.
    - Microsoft Sequel Server
    - Microsoft Access and/or Excel (if available)
    - Microsoft MapPoint (if appropriate)
    - HWeb application Suite
    - Add to client CRM
    - Create Hudson “license”
    - Request shell web reservation site (if applicable)
  7. Create / import \*.csv files (NOTE: may be created by Hudson and/or Client)
    - Fares.csv
    - Airlines.csv
    - Data from other applications (Vehicle, Driver, Comm devices, profiles, etc)
    - Upload to web reservation site (if applicable)
  8. Configuration (Preliminary): building the system
    - General client contact info, phones, URL, email, etc
    - Airports
    - Services
    - Directions
    - Payment
    - Fare Components
    - Service Extras
    - Taxes
    - Times
    - User Access / Templates (ResTemplate, DispTemplate, AcctTemplate, Supervisor, etc)
    - Template setup – confirmations (email / fax), receipts,
  9. Initial Training and Orientation
    - Review Fare file layout and design
    - User Access account setup
    - Configuration: Fare & Services (overview only)
    - Configuration: Advanced Features (overview only)
    - Reservation Entry, edit, cancellation process – Orientation and overview (identify configuration punch list items during process). If possible, make immediate changes inside configuration so client sees how quick, easy to configure the application).
    - Client confirms fares / fees are calculating correctly. Identify errors inconsistencies
    - Guide / show client how to adjust configuration items themselves, if practical and time permits. This is beginning of transitioning the system FROM Hudson TO the client – getting them to take ownership of process and participate in updates, changes, modifications.

10. Discussion / review of Client dispatching procedures with HWeb Dispatcher
  - a. Initial design and layout of required grids
  - b. Assembly of proposed Desktops
  - c. Review of dispatch workflow with client / dispatchers
  - d. Revise and adjust grids / desktops as needed
  
11. Discuss / review of Client reconciliation and invoicing procedures with HWeb Admin
  - a. Review driver reconciliation procedure
  - b. Review invoice creation / printing
  - c. Review receivables management
  - d. Review commission statements (if applicable)
  - e. Review standard reporting requirements
  
12. Clients' Internal Training – Practice
  - Client conducts this training themselves
    - Reservations
    - Dispatching
    - Reconciliation
    - Invoicing
    - Commissions
    - Reporting
  - Hudson available as a resource for questions.
13. Client Reservation cutover – all reservations beyond future date are entered into HWeb Only
14. Client Go-Live
  - Hudson presence / availability / functions during
    - Reservations
    - Dispatch
    - Accounting
  - Timing of the go-live (weekdays vs weekends, Invoicing and or Payroll periods, etc)
  - From 1 day to 5, depending on client size, needs, complexity
  - One System vs Dual Entry (and dual dispatch)
  - Heightened Development Priority (issues now given high precedence)
  - First Payroll
  - First Invoicing
15. Post-Installation Support
  - ❖ TechTips Newsletter – feature and functionality updates
  - ❖ HWeb KnowledgeBase – Self-Help, FAQ's
  - ❖ Hudson Tech Support
    - [support@hudsonltd.com](mailto:support@hudsonltd.com)
    - Phone support – routine
    - Phone support – emergency
    - Support fees / packages / hourly tracking
  - ❖ Site visits