PRABHU BALAKRISHNAN

Senior Livelink Business Analyst – Supai Systems

Professional Summary

Experience
- 13 years Open Text Content Server (Livelink)
  - ✓ Business system design, including information architecture
  - ✓ Technical architecture, including secure extranet architecture, high-availability clusters, and remote cache installation
  - ✓ Requirements analysis
  - ✓ Design and implementation of complex Livelink workflows using form templates and highly usable form custom views
  - ✓ Workflow map design and customization
  - ✓ WebReports and LiveReports design and development
- Professional services leadership and management
  - ✓ Project management, scoping, estimation, and proposals
  - ✓ Interviewing, hiring, training, evaluation, termination, etc.
  - ✓ Time-and-expense reporting – production and supervision
  - ✓ Process management
  - ✓ Professional development of staff
- 15 years IT experience

Employment
- Director, Supai Systems, 2005 – Present
- Livelink Architect, Optima Global Solutions, 2003-2005
- Senior Software Engineer/Livelink Admin/Programmer, Patni Computer Systems, 1999-2003
- Systems Analyst, Tech Consulting, 1997-1999
- Financial Accounting Executive, Ashok Leyland Finance (ALF), 1994-1996

Livelink Training
- Knowledge Fundamentals
- Email Archiving and Management Administration for MS Exchange
- Email Monitoring Administration for MS Exchange
- Workflow Design I, II, and III
- Designing and Implementing Livelink Forms
- Records Management, Physical Objects
- Builder Fundamentals, Builder Workflow Customization
- LAPI Fundamentals
- Advanced Schema and LiveReports
- System Administration

- Configuring & Customizing Livelink Search
- Troubleshooting and Supporting Livelink
- Architecture & Security Workshop

Technical Skills
- Programming languages
  - ✓ OScript
  - ✓ Visual Basic
  - ✓ C, C++
  - ✓ PL*SQL
  - ✓ Java
  - ✓ HTML
  - ✓ JavaScript
- Frameworks
  - ✓ Livelink API (LAPI)
  - ✓ J2EE
  - ✓ JSP
- RDMS/Database Management
  - ✓ Oracle 7.3, 8i, 9i with Real Application Clustering
  - ✓ Microsoft SQL Server 2000
- Operating Systems
  - ✓ Microsoft Windows XP, 2000, NT
- Internet Services/Web Servers
  - ✓ WebLogic 7.0, 8.1
  - ✓ Apache Tomcat

Education
- Bachelor of Commerce (Financial Accounting) 1993, University of Bombay, India
- Master of Commerce (Financial Accounting) 1994, University of Bombay, India

Content Server Upgrade, Document Workflow, and Taxonomy

August 2011 – Present

North West Redwater Partnership (NWR) is building a major upgrading facility and refinery in the Alberta industrial heartland. NWR chose Livelink as the document package for the capital project and selected Supai Systems to provide business process analysis, workflow design, and technical support services. The system went live in April 2012 and manages every controlled document required for design, operation, and maintenance of the refinery.

Mr. Balakrishnan worked on-site and remotely. He conducted interviews and workshops, gathering and documenting business requirements and ensuring alignment with NWR information management strategy. He defined and following a stakeholder communication strategy for the first and second implementation waves and prepared many functional and high-level design documents for end users and project sponsors. He was a key player in defining and implementing a renewed taxonomy (also called community, information, and security model, or CIS).

Controlled Engineering Records Workflow and Reporting

September 2009 – July 2010

Suncor is a Canadian integrated energy company focused on development and production of oil and natural gas. Suncor uses Livelink to manage controlled engineering records, primarily using the CER modules from OpenText and vdR Group.

Working through IBM, Mr. Balakrishnan spent three months on-site in Calgary and worked remotely thereafter. He gathered and documented functional requirements for implementing engineering document life cycle management workflows, designed enhanced intelligent search for engineering drawings and WebReports, gathered and documented business requirements for migration of learning management content from network file shares to Content Server, and defined category and attribute metadata.

Product Management

March 2009 – Present

Livelink user experience is greatly enhanced when containers display thumbnails of image and other objects. Users are able to more easily decide which documents they need without downloading them first.

Supai Systems built a module that generates thumbnails of documents and stores them as renditions in the Livelink system.

Mr. Balakrishnan was the product manager for this product. He wrote feature specifications, approved test cases, and oversaw the development effort. The product is now used by six customers in production Livelink systems and is available for Content Server 10.

Livelink Workflows and LAPI

July 2009

ZymoGenetics is a pharmaceutical company that uses Livelink for document and records management, controlled records, work process automation, and collaboration. ZymoGenetics needed two workflow applications to be developed, one for controlled documents and the other for automating a process for its HR department. A third application also was needed that would fetch records from an MS Access database and create folders with associated metadata in the Livelink system.

Mr. Balakrishnan worked onsite to collect and document business and functional requirements for engineering document review and employee resume and profile management. He also designed and oversaw development of a Java application that fetches data from the MS Access database and interacts with Livelink using LAPI to create folder objects and set associated category metadata and set out the work breakdown structure for upgrading from 9.5 to 9.7.1.

Livelink Upgrade

January – February 2009

Canada Newswire (CNW Group) distributes news and information in text, audio, and video formats. Their mission critical, multiple-language news release processing system is built on the Livelink platform and their public Web site uses RedDot WCM. This project required a major upgrade from Livelink version 9.2 to 9.7.1.

Mr. Balakrishnan worked onsite to build and synchronize environments and upgraded several custom modules to work as designed in version 9.7.1. He:

- Planned and executed the Livelink upgrade
- Performed user administration
- Coordinated Livelink governance

- Communicated extensively with Open Text support personnel

Livelink System Adoption Consulting with Workflow and Upgrade

August 2008 – December 2008

The Ministry of Transportation, Alberta, Canada, uses Livelink for document management and collaboration. The ministry wanted to greatly improve user adoption of the Livelink system and build several mission-critical workflow applications, and sought a way forward to achieve these objectives.

Mr. Balakrishnan worked onsite at the Ministry interacting with the different user groups, devised and developed components like dashboards and custom views that greatly enhanced the user experience of the Livelink system. He designed and developed several easy to use but highly complex workflow applications using the Livelink workflow engine, Web Forms, and OScript programming.

He also upgraded the Livelink system from version 9.7.0 to 9.7.1 that enabled the Ministry to leverage the Livelink Enterprise Web Services suite available in the upgraded version of the product.

LAPI Programming—Project Document Export

April 2008 – July 2008

Primavera, an independent software vendor of high-end project management solutions (acquired by Oracle in October 2008) used Livelink to manage customer projects. On completion of a project, Primavera required to export all the contents within the Livelink project structure onto a MS Windows file system media and provide it to the customer.

Mr. Balakrishnan designed and developed a Livelink application to export documents to an external file system. This application used the Java LAPI to export artifacts from multiple projects, specify exclusion of object types from the export, and circumvent the NTFS 255 character limit on the length of an object path or location.

Workflow Customization with Item Handler Step

January – March 2008

Blum Capital, a financial institution in the USA, uses Livelink workflow to manage its document content and business process automation.

Mr. Balakrishnan analyzed functional requirements and designed a workflow solution comprising Livelink Web Forms and eSign for monthly tracking private and public security transactions.

Specific deliverables include:

- ✓ Form template and HTML form views
- ✓ OScript module
- ✓ Item handler step configuration and customization

Livelink Architecture Troubleshooting with Remote Cache

October – December 2007

IDEXX Laboratories is a worldwide leader in innovative products and services primarily for veterinary, food and water testing markets. IDEXX uses Livelink to power its intranet, with document management and collaboration as its key functions. IDEXX implemented the Livelink Remote Cache at multiple locations to improve speed in delivery of documents to its users.

Mr. Balakrishnan identified multiple root causes that were adversely impacting the performance of the Remote Cache implementation. He re-architected the Remote Cache server setup achieving above 200% performance improvements, and implemented new Remote Cache server implementations to service additional locations of the customer.

Regulated Documents Lifecycle Management Implementation

May – August 2007

Peabody Energy is one of Australia's largest mining companies with 10 locations in Queensland and New South Wales.

Mr. Balakrishnan worked onsite in Brisbane, Australia, to designed and develop a suite of highly complex Livelink workflows using forms, Workflow Extensions, eSign and OScript customizations to manage the full life-cycle of regulated and/or controlled documents at Peabody.

Specific deliverables included:

- ✓ Workflow map and step configuration
- ✓ HTML form views
- ✓ eSign watermarks
- ✓ OScript event scripts

Automated Structured Folder Creation Using Workflow

January – April 2007

Republic Financial, a financial services firm, uses Livelink as a "virtual deal book" for complex transactions involving electronic and physical records.

Analysts, salespeople, attorneys, and staff use a "virtual deal book" to store, control, and view electronic and physical records. An automated solution was required that would replace the manual creation of the virtual deal book taxonomy, which was time-consuming and error-prone.

Mr. Balakrishnan proposed and implemented a solution that included a complex workflow map with customizations to automate creation of a complex folder structure. The solution eliminated manual work, resulting in improved audit compliance, reduced administrative overhead and the elimination of errors related to the organization of documentary records.

Mr. Balakrishnan developed and managed the production of the following specific deliverables:

- ✓ OScript custom code
- ✓ Workflow event scripts to create complex folder structures based on workflow attributes, user settings, and workflow attachments
- ✓ Workflow event scripts to attach categories to the folders and assign attribute values
- ✓ Custom module to remove categories from folders based on user settings and workflow attribute values
- ✓ Custom module to perform extensive error-checking and roll-back functionality
- ✓ Item handler step configuration and customization
- ✓ Workflow map

OScript Module for Livelink Move Customization

October – December 2006

The Aerospace Corporation is a federally funded research and development center that uses Livelink for knowledge management across the enterprise.

As a company that develops, markets, and sells information, The Aerospace Corporation relies heavily on knowledge management processes. The company experienced significant user reluctance to accept/adopt the system. A common barrier to adoption was the

standard method by which Livelink handled permissions when moving a knowledge artifact from one location to another within the system.

Mr. Balakrishnan defined requirements and supervised the programmers who modified the Livelink "Move" functionality so that it resembled certain client-specified features of Livelink "Copy."

Livelink Upgrade

April – September 2006

MetLife, the largest US insurance company, has multiple Livelink implementations having large repositories. MetLife uses Livelink for managing documents pertaining to its customers such as insurance policies, premium reminders, claims and notices. MetLife also uses the Livelink Communities of Practice (COP) suite to power its Intranet portal. An upgrade from version 9.0 to 9.5.1 was required.

Mr. Balakrishnan worked on-site, building environments, upgrading Livelink, and troubleshooting the system.

Included in the upgrade were upgrade planning, extensive end-user communication, upgrade of custom module using OScript, and LAPI applications programming, testing, and troubleshooting.

Livelink System Technical and Business Assessment

November 2005 – February 2006

Factiva, fully acquired by Dow Jones in 2006, is into the business of gathering and compiling news releases in multiple international languages. It has built several of its business processes relating to information gathering and publishing on its Livelink system using the Livelink workflow.

This project entailed a detailed assessment of the Livelink system. Application architecture and also the design of workflows had to be analyzed and recommendations had to be made for performance and user experience improvement.

Mr. Balakrishnan studied the Livelink implementation in great detail and closely analyzed several complex workflows that were present in the system. He wrote a document that provided detailed recommendations for the Livelink architecture improvement and suggested significant changes to the workflow designs that considerably improved the application performance. He personally implemented several of the

recommendations and made configuration changes that improved performance and enhanced the user experience.

Wells Fargo Bank

February 2003 – August 2005

Wells Fargo Bank is a leading US financial institution. Wells Fargo has a significant Livelink implementation that is used extensively by several departments for document management, collaboration and process automation.

Mr. Balakrishnan worked on multiple projects over three years. Representative accomplishments and deliverables included the following:

- Upgrades
  - ✓ Version 9.2 to 9.5
  - ✓ Version 9.1 SP3 to 9.2
- Migration from UNIX to Windows 2000
- Admin server separation
- Clustering and failover (BCP) site
- Workflow analysis, design, and development
- Custom OScript module development
  - ✓ Bulk User Creation (enrollments)
  - ✓ Audit Enhancements
  - ✓ Workflow components
  - ✓ New LAPI functions
  - ✓ New System Administration functions
  - ✓ Event Scripts
- UI customizations and functionality enhancements
- Planned implementation phases and Livelink infrastructure design
  - ✓ Configured and setup system infrastructure including multiple Livelink instances in different clusters, and a replicated BCP site
- Developed framework design for applications to interface with Livelink
- Analyzed and re-designed existing client Loan Disbursement Workflow.
- Customized Livelink User Interface
- Created a Document Approval Workflow with several Forms for use by all departments in client's organization
- Developed multiple custom LiveReports
- Modified the LiveReport API to enable calls to OScript program units from within LiveReports

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- Created Architectural, design and test plan documents for all system components.

General Electric Aircraft Engines

November 2000 – January 2003

General Electric Aircraft Engines is a leading manufacturer of aircraft engines with an international clientele. Their IT organization is highly structured and streamlined. Livelink is an integral component of their process automation, and document management approach for satisfying government regulations such as export compliance.

Multiple projects over two years included the following accomplishments and deliverables:

- Workflows for Supplier Change Management, Vendor BCP Tracking, Travel Itinerary Management, Vendor Contract Management and Sourcing Export Compliance
- Livelink Administration and Performance tuning
- Custom OScript Modules – Bulk Upload of Documents, Access Control, Management of Livelink Services through Web Browser
- LiveReports
- Upgraded performance of implementation
- Gathered functional requirements via meetings with client management and end users
- Designed and developed Workflows – Forms, OScript Event Scripts, and LAPI programming.
- Documentation
  - ✓ Requirements
  - ✓ Use Cases
  - ✓ System Design analyses
  - ✓ Test Plans
- Customized Livelink user interface based upon vendor recommended best practices
- Developed OScript common components for use in all Workflows
- Built LAPI interface for efficient communication of Livelink with external applications
- Designed and developed new LAPI functionality for document management.

Employer: Patni Computer Systems

Patni is a large IT solutions provider with an international clientele.

Multiple projects over two years included the following accomplishments and deliverables:

- Web application projects
  - ✓ Netscape Enterprise Server
  - ✓ WebLogic 6.0
  - ✓ Servlets
  - ✓ JSP
  - ✓ Java Beans
  - ✓ Rational Rose 98
  - ✓ Oracle Web Application Server V4.0
  - ✓ Dynamo 4.5.0
  - ✓ CGI using PERL, SQL, PL*SQL, SQL Loader
- Multiple Project roles
  - ✓ Developer
  - ✓ System Analyst
  - ✓ Project Leader
- Large Extranet, Intranet and Internet applications for supply clients
- Chain Management, Sales Order processing, Insurance Premium Quotes, HR Appraisal process
- Requirements collection, Creation of Use Cases, Test Plans for Unit and Integration testing
- Preparation of Class Diagrams using Rational Rose 98
- Application and database tables design
- Data loading from legacy systems to Oracle databases using SQL Loader, UNIX shell scripting
- Project coordination between onsite and offshore project development staff
- Staff mentoring, and code review
- Execution of test plans and defects fixing
- Performance tuning of Servlets, SQL statements and PL*SQL Stored Procedures.

Tech Consulting

Numerous projects for this client included the following accomplishments and deliverables:

- Oracle Developer 2000 (Forms 5, Reports 3), Oracle 7.x for MS Windows NT and 9x, SQL, and PL*SQL
- Inventory, Sales, Payables & Receivables modules for medium-sized clients
- Banking application to manage Savings & Fixed Deposit Accounts
- Applications to manage Billing, and documents storage
- Collection and analysis of Functional Requirements
- Test case development

- Development of Forms and Reports using Oracle D2K 2000 Forms 4.5, 5 and Reports 2.5, 3
- Code construction for PL*SQL Stored Procedures and Functions
- Design of Flex-field structure and cross-validation rules
- Module integration
- Unit and Integration testing
- Application and SQL Performance tuning
- Data porting from legacy system using SQL Loader.

Employer: Ashok Leyland Finance (ALF)

ALF, a premier Indian non-banking finance company specialized in hire-purchase and lease financing of Ashok Leyland trucks, light commercial and non-commercial vehicles, and machinery to a diverse client set from individual customers to large corporations.

ALF had excellent accounting policies and practices in place that were complemented by effective IT infrastructure and support.

Duties included performing various Financial Accounts Executive functions involving posting accounts transactions to ledgers, reconciliation of customer and ALF Bank accounts, and preparation of final settlements for contract accounts.