

Exhibit A: Scope of Work

A. Proof of Concept

Consultant will provide a complimentary site review at customer's location that includes a product demonstration and an analysis of the department's requirements intended to produce a Proof of Concept scope and estimate with a fixed price quote based on professional services and software costs detailed in Exhibit B: Pricing and Payment.

Upon approval of this agreement, Consultant will provide any combination of the following services based on the requirements determined in the Proof of Concept.

B. Definitions

- o Countywide Retrieval Matrix: County Wide Taxonomy Worksheet showing global filing methodologies by Department.
- o Document Inventory Matrix: Department Taxonomy Definition Worksheet showing global filing methodologies by Department.
- o Master Configuration Matrix: Department Taxonomy Configuration Worksheet showing global filing methodologies by Department.

C. Department Project Work

1. *Kick off Meeting*

Consultant will hold a kick off meeting to organize the team, establish project goals, define roles and responsibilities, set expectations and ground rules, and discuss a project plan.

Deliverable: Kick off Meeting

2. *Project Management Plan*

Consultant will coordinate with County to produce a written document that outlines tasks, milestones, target dates, and deliverables required to meet the department's requirements.

Deliverable: Written Project Management Plan

Milestone 1: Approved Project Plan by Consultant, Department, and ISD

3. *Project Update Summary Report*

Consultant will provide a Project Update Summary Report no less frequent than bi-weekly detailing the activities of the previous period, highlights and lowlights including issues and problems, activities planned for the next period, and an update to the Project Plan if needed. Any Project Plan updates that change the scope or dates will require the department and ISD approval.

Deliverable: Bi-weekly Project Update Summary Reports

4. *Procurement*

Consultant shall procure the Hyland software modules and licenses outlined in the Proof of Concept.

Deliverable: Software modules and licenses

5. *Taxonomy and Enterprise Content Management Design*

Consultant will develop and document a taxonomy system, which indexes information, document types and their associated keywords. The taxonomy will integrate with the County's records retention schedules and documents in the Countywide Retrieval Matrix.

Consultant will assist department in completing a Document Inventory Matrix (DIM). Based on the results of the DIM, Consultant will recommend to department a document capture strategy.

Consultant shall complete a Master Configuration Matrix.

Deliverables: Document Inventory Matrix
Master Configuration Matrix
Countywide Retrieval Matrix
Scanner Recommendation

Milestone 2: Approved Document Inventory Matrix and Master Configuration Matrix

6. *Capture Design Strategy and Implementation*

Consultant will develop various design strategies based on the requirements defined in the Proof of Concept, but not be limited to those listed below. Consultant will implement the strategy developed for a department.

i. Scanner and Multi-Function Printer Design (MFP) Capture Strategy Design and Implementation

Production imaging on scanning workstations including ingesting images from any MFP that is configured to scan images to a directory. Utilize efficient document separation techniques (e.g. patch-codes, coversheets or barcodes), providing efficient indexing (e.g. data validation, automatic index field lookups), efficient release of images and meta-data to the OnBase database, and system configurations specific to OCR document.

ii. Fax Capture Strategy Design and Implementation

Consultant shall also configure faxes to be ingested by OnBase via directory import.

iii. Backfile Capture Strategy Design and Implementation

Define a strategy and options for converting department backfiles converting them to imaging files. Consultant will provide configuration and documentation of process.

Deliverables: Design and Implementation of Capture Strategy
Design and Implementation of Scanner and MFP Capture Strategy
OnBase image ingestion from scanning workstations
OnBase image ingestion from MFPs configured to scan images to a directory
Design and Implementation of Fax Capture Strategy
Design and Implementation of Backfile Capture Strategy
Documentation of Backfile process
Milestone 3: Department approval of all deliverables named in Design Strategy and Implementation.

7. *OnBase Integration with Active Directory*

Consultant will integrate OnBase with Active Directory on computers identified by department. Consultant shall assist department and ISO in developing proper security groups within OnBase to comply with security requirements identified by department. ISO will mirror the security groups in Active Directory.

Deliverables: Scripts for OnBase installation for both test and production systems.
Security groups in OnBase.
Validate accuracy in test system.

Milestone 4: Department approval of Integration Active Directory.

8. *Records Retention Implementation*

Consultant shall implement records retention on documents identified by department in a Document Inventory Worksheet. Department responsible for review and any revisions of its retention schedule, obtaining appropriate approvals for any changes required. Department shall provide document type mapping to the approved records series.

Deliverable: Document Inventory Worksheet
Document Type: Mapping Matrix

Milestone 5: Department approval of accuracy of integration in test system.

9. *Third Party Line of Business Application Integration*

Consultant shall integrate OnBase with customer's third party business application. Consultant shall create a working model in the Test System to validate the system with requirements prior to System Design. Consultant will use the results of the document inventory matrix and configure the system accordingly. Users will test the security settings. Consultant will provide initial training reviewing proof of concept with test users.

Deliverable: Validation of OnBase Integration with Third Party Business Application in Test System and a written sign off.
Proof of Concept in Test System.
Training

Milestone 6: Department approval of accuracy of integration in test system.

10. *System Installation Configuration & Customization*

Consultant will install, configure, and customize the system to meet the requirements

outlined in the design strategies. All work will be performed on the Test System and fully validated before installing changes in the production system.

Deliverable: Installed, Configured, and Customized Test System

Milestone 7: Installed, Configured, and Customized Test System

11. Training in Test System

Consultant shall develop written training plans in coordination with County for end users, capture mechanisms, and system administrators. Consultant shall develop and provide training documentation. Consultant shall provide on-the-job training separately for each department. Consultant shall facilitate and lead the administrator training.

Deliverable: Written Training Plans, Tailored to Department

On-the-job Training for End Users

On-the-job Training for System Administrators

12. Testing

Consultant shall develop a written test plan in coordination with County to validate the system is functioning as intended. This shall include testing all capture mechanisms listed herein. If County identifies any deficiencies during testing, Consultant shall make every effort to resolve the deficiency. Consultant shall keep an issues log of deficiencies identified named the Testing Issues Report, and provide weekly updates to County as to the resolution status.

Deliverable: Written Test Plan

Testing Issues Report

Milestone 8: Department approval and acceptance of test system.

13. Implementation in Production System

Once department has approved and accepted the test system, County, in cooperation with Consultant, shall request approval to move to the production system through County's change management process. Once approved, Consultant will move to the production system. Consultant shall provide a representative on-site on the date of "go-live" and shall have additional technical resources available immediately to resolve any issues.

Deliverable: Move to Production System

On-site Representation

Milestone 9: Move to production system

14. Documentation

In addition to all of the documentation preceding this item, Consultant shall provide written documentation for the system design, installation, capture help files for end users,

Deliverable: System Design Documentation

Installation Documentation

Capture Help Files for End Users Documentation

Milestone 10: Final approval and acceptance that project requirements have been met.