



City of Lakewood – Docuware Implementation - HR Statement of Work

This Statement of Work is made by and between:

<p>ComDoc 3458 Massillon Rd. Uniontown, OH 44685 (hereinafter "ComDoc")</p>	and	<p>City of Lakewood 12650 Detroit Rd Lakewood, OH 44107 (hereinafter "customer")</p>
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This Statement of Work shall be governed by, and is an integral part of, the Master Services Agreement (MSA) effective "Date" between ComDoc and "Client". In the event of conflict between this Statement of Work and the Master Services Agreement, the terms and conditions of the MSA shall prevail unless specifically and purposely modified by herein.

This Agreement expressly supersedes and replaces all Proposals and/or Statement of Works (whether oral or written) and any other communications between ComDoc and the Client relating to the subject matter of this Agreement.

I. ComDoc Project Team and Roles

ComDoc will engage the following resources for this project:

Name	Role	Effort	Rate
Dave Ruiz	Project Manager:	Project Communications Scope Management	druiz@comdoc.com
Nathan Eckberg	Project Analyst:	Process review Technology review	neckberg@comdoc.com
Jim Barone	Account Manager	Overall account management	jbarone@comdoc.com
Chris Scalera	Applications consultant	Application selection, agreement process	cscalera@comdoc.com



II. Assumptions

The following are assumptions upon which this Statement of Work (SOW) is based:

- Client will identify a Project Manager/Owner as a Primary Contact for this project Client will establish a Project Steering Committee for this project
- Client will ensure support and participation from all project stakeholders
- Client will comply to the agreed upon project schedule
- If available, Client will share current state documentation
- Project work will be done both on-site and off-site
- Each Project Phase when completed will be signed off on by both parties
- Any changes to this (SOW) will be documented in a Change Request Form and will be agreed to and signed off on by both parties.
- Submission of a Change Request (by the customer) does not imply that the change will be made.
- ComDoc will configure necessary scanning on MFP's and/or scanners under a ComDoc maintenance contract. Configuration of devices not under a ComDoc maintenance contract will not be the responsibility of ComDoc.
- Client will be responsible for providing proper access to any pertinent databases, as well as the appropriate tables and views etc.
- Remote access (Assisted or Unassisted) to Servers will be provided to ComDoc, by the Client. If this access cannot be granted, additional Implementation and Maintenance costs may be required. Windows updates for all servers and workstations will be the responsibility of the client.
- Configuration and Maintenance of scanners or MFP's not under a ComDoc Maintenance contract, will be the responsibility of the Client.

III. Travel Expense Reimbursement. **** applies only to travel outside of ComDoc footprint

In addition to the payment for the project, Client will pay all actual, reasonable, documented travel related expenses incurred by ComDoc in connection with the provision of the Services in accordance with the terms of the Master Services Agreement. ComDoc adheres to the following travel policy and makes travel arrangements and accommodations in accordance with the travel policy as follows. If Client requires ComDoc resources to travel beyond the standard daily trips to Client site(s) the following travel rules will be followed:

- Airfare - All travelers are required to travel at the lowest reasonable cost. Every attempt will be made to book travel requirements at least two weeks in advance. On domestic flights, travelers are required to travel coach class.
- Hotel – Client or ComDoc will provide a list of hotels and corporate apartments where discounted rates have been negotiated. All travelers will be expected to stay at these locations when reasonably available.
- Car Rental/Personal Car - Traveler may only rent mid-size "intermediate" or compact cars. Every attempt will be made to reduce the number of rental cars by combining 2 or 3 consultants in one rental car whenever possible. If a personal car is used, mileage will be reimbursed at the current Internal Revenue Service standard mileage rate. Tolls and parking fees will also be reimbursed.
- Meals – Travelers will be reimbursed for reasonable expenses for breakfast, lunch and dinner while working at a location other than the traveler's normal office location. For meal allowances and incidental expenses, ComDoc will be reimbursed up to \$50.00/per day, per consultant in the continental United States.

All expenses must be documented with the original receipt for the expense. These receipts will be retained by ComDoc and copies provided to Client upon request.



IV. Project Objectives

The objectives of this project are outlined below.

- Storage and Retrieval of HR Documents
 - This project includes up to 3 file cabinets
 - Index fields
 - Customer will define
 - Full text search available for machine printed documents
 - Scan to Docuware from any networked MFD or local scanner
 - Automated indexing of structured and semi-structured documents
 - Storing of emails via connect to outlook/connect to mail
 - May be automated or ad/hoc
 - Provide link documents by claim or employee name or number
- Internal HR forms/workflow-
 - Create up to 3 forms/processes
 - Create up to 3 workflow processes
 - Archive forms
- Automated Import and Capture configuration
 - Automatic import from network folder- comdoc will configure import configuration
 - Customer responsible for setting up scan destination on multi-funtional devices not managed by ComDoc
 - This may be done by customer or MFD provider
 - ComDoc will assist as much as possible in any case
 - Intelligent indexing configuration
 - Up to 5 barcode and forms templates
 - UP to 4 connect to outlook/connect to mail configurations

Limitations

Data Migration to any other system dependent on systems ability to accept data in standard CSV/XML formats and our data base table/ODBC access to system DB.

*** scanning "button" feature on existing multifunctional devices not managed by ComDoc must ^{be} ~~me~~ addressed by the customer ^{ds}



V. Project Detail

The processes outlined above will be created using the following software applications and modules. This list includes all modules and licenses purchased by the Client, for this project.

DocuWare

- **Docuware Cloud**

Solutions Planning Guide

A Solutions Planning Guide will be provided as an accompaniment to this SOW. Depending on the Complexity of the project, varying degrees of detail may be needed to successfully complete the project. In some cases, all details of the Solutions Planning Guide may not be determined prior to submission of this SOW. Areas that may be addressed in this document include:

- **Project Overview** – Basic project information
- **Project Plan** - tasks and responsible parties
- **Retention Policies** - any document types that would require automatic or semi-automatic deletion would need to be defined within this section.
- **Search Capabilities** - Any detail regarding Search Dialogs (Fields used, Select Lists, Formats, User Access) will be defined within this section.
- **Storage Capabilities** - Any detail regarding Store Dialogs (Fields used, Select Lists, Formats, User Access) will be defined within this section.
- **User Rights/Security** – A list of users, method of user creation, password criteria, User Groups, Roles, Profiles and cabinet Profiles will be defined within this section.
- **Image Capture Methods** – Software Applications, Modules, Source Folders, Indexing Methods, File Types and Hardware to be used will be defined here.
- A **Flowchart** will be provided (when applicable) within the "Solutions Planning Guide" Workbook, to illustrate any advanced Workflow needs required within the project.
- An **Index Field Addendum** will be provided within the "Solutions Planning Guide" Workbook, to detail all Index Fields pertinent to the project.
- Any **Data Integrations** to external Data Sources used for input/output of project specific data will be outlined in this section.



VI. Change Process

Change Requests will be submitted by the Client using the Solutions Change Request form. Each request will be evaluated by ComDoc to determine the request's viability as well as any additional labor or modules that may be required to complete the request. Change Requests should be submitted to the ComDoc Project Manager as outlined in Section I of this document. Upon review of the request, ComDoc will communicate an ETA and potential cost for the request, prior to any work being done.

VII. Project Review

It is the recommendation of ComDoc that, upon completion of the project, a Project Review meeting is held between ComDoc and the Client. The timing/necessity of this meeting may vary by project and will be agreed upon by ComDoc and the Client. Topics of that meeting may include:

- **Revisit previous state (before project inception)**
 - Review of the previous business process
 - Evaluation of the previous business process
 - Review of gaps and challenges of previous process

- **Revisit current state (after project inception)**
 - Review of the new business process
 - Evaluation of the new business process
 - Identify gaps and challenges of new process
 - Were recommended modules/licenses sufficient?
 - Are Servers/PC's running as expected?

- **Future State recommendations (beyond scope of this project)**
 - What other areas have been affected by this new process? How?
 - Are any further projects needed, now that this process in place?
 - Are any additional modules or licenses needed?



VIII. Acceptance

The above summary and referenced addendums are agreed to and accepted as the Scope of this Project, by a duly authorized officer of each party on behalf of such party as of the Effective Date set forth in the Master Service Agreement.

ComDoc

Signed: _____

Name (printed): _____

Title: _____

Date: _____

Client

Signed: _____

Name (printed): _____

Title: _____

Date: _____

Approved As To Legal Form:

Director of Law, City of Lakewood