# Overview

Customer Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Describe the project’s primary goals from the big picture. How will we define “success”?

# Deployment Architecture

Will you need 24/7 Availability?

Please provide your disaster recovery requirements in terms of RTO[[1]](#footnote-1) and RPO[[2]](#footnote-2).

Please add any other considerations regarding the deployment configuration that might be relevant to your networking design.

# Capacity

## Desktop Design Studio

How many desktops will run EDS? (5 is a typical number to begin with) \_\_\_\_\_\_\_\_\_\_\_

## Web Access

Estimate the web-side load:

* How many internal users? \_\_\_\_\_\_\_
* How many customers be using the portal during the busy hour? \_\_\_\_\_\_\_\_\_\_
* How many requests will correspondence use case or on-demand use case generate during the busy hour? \_\_\_\_\_\_\_\_

## Document Production

Estimate the initial rendering load:

* Average number of documents in a busy day (includes Email and SMS) \_\_\_\_\_\_
* Peak number of documents \_\_\_\_\_\_\_\_
* Average number of pages per documents \_\_\_\_\_
* Evaluate Data Aggregator load

🞏 Heavy (many correspondence or onDemand, or simultaneous with large data sets, or complex)

🞏 Medium (somewhat complex, but not large or time sensitive. Or, simple and frequent)

🞏 Light (Simple and infrequent, or not time critical)

# Documents

Please list all of the documents you expect the initial implementation will produce. Include web pages, Email, dashboards, and SMS messages as well as traditional print-ready documents. For each document, list the channels that will have access.

|  |  |  |  |
| --- | --- | --- | --- |
| **Document Name** | **Delivery Channels** | **Format Requirements** | **Workflow Name** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Please provide a description of the processing done by each workflow listed above.

|  |  |
| --- | --- |
| **Workflow Name** | **Processing Requirements** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Delivery Channels

Will documents be delivered to either printers or to print management software? \_\_\_\_\_\_\_\_

If so, will any print stream engineering be necessary (e.g. routing to correct printer, sorting, etc.). Please describe print stream requirements.

Will SMS messages be sent? \_\_\_\_\_\_\_

Will Email be sent? \_\_\_\_\_

Will the customer portal be utilized? \_\_\_\_\_

Will there be any content management storage downstream from the EOS repository? \_\_\_\_\_

If so, please list the names of the storage products

# Customer Management

Will the EOS portal be enabled? \_\_\_\_\_\_\_

Will customer information be synchronized periodically, or updated in real time through a business process integration? 🞏Periodically 🞏Real Time

Will the marketing module be used to target specific customers? \_\_\_\_\_\_

If so, please provide a general plan for how your customer base might be segmented for targeted messages.

Is this platform supporting a service that will render documents on behalf of other companies? \_\_\_\_\_

If so, will customer profile information be collected through forms, and stored on EOS? \_\_\_\_\_\_

Please describe the sort of profile information to be stored (e.g. logos, fonts)

# Integration Points

## Data Sources

Please list all of the data sources that contain data relevant to document production.

|  |  |
| --- | --- |
| **Source Name** |  **Access Technology** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

If this is a SaaS deployment, will a “Data Pump” be required? \_\_\_\_\_\_\_

## CRM Application

What specific CRM application is currently in use (e.g. Salesforce, MS Dynamics)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will EOS need to integrate directly with this CRM application?

During document composition (e.g. pull transaction info)? \_\_\_\_\_\_\_\_\_\_

To synchronize customer account information cached on EOS (e.g. address)? \_\_\_\_\_\_\_\_\_\_\_\_

## SMTP Server

If Email channels will be used, is Email bounce management a requirement? \_\_\_\_

Is there a preference for a specific Email server product? (Out of the box, EOS uses AWS for Email delivery and bounce management. Standard SMTP delivery is also supported, but without bounce management). \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Hot Folders and Message Queues

Will EOS workflows be triggered by the appearance of upstream files within a shared folder? \_\_\_\_

Will EOS workflows be triggered by the appearance of messages on a Microsoft Message Queue? \_\_\_\_

## Identity Management

### EOS User Identity

Will EOS host EOS user authentication credentials, or will they be stored in an external identity management solution, such as Active Directory? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will EOS need to support SSO for users (e.g. CSR logged into contact center, and occasionally accessing EOS for correspondence composition)?

If so, please describe the identity management solution and the protocols in use.

### Account/Customer Identity Management

Will EOS host customer authentication credentials for Portal access, or will they be stored in an external identity management solution, such as Active Directory? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will EOS need to support SSO for customers (e.g. authenticated by the company’s web server before connecting to EOS customer portal)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If so, please describe the identity management solution and the protocols in use.

## REST API

Please describe any integration requirements that use the REST API. The REST API interface does not return any HTML. This might include invoking a workflow, adding a customer record, searching for files, or any other programmatic access to the EOS services.

## Web Server/URL

Please describe any integration requirements that will utilize HTML generated by EOS. This might include interactive forms on web pages, display of digital experience documents, and similar presentation-level services.

# EOS Access Roles

Please provide a list of roles envisioned for the EOS solution. Include a separate list for every environment. Some required roles are already listed.

|  |  |  |
| --- | --- | --- |
| **Environment** | **Role** | **Duties** |
| Production | Environment Administrator | Configure users, groups, environment variables, and connections to databases, servers, etc. |
| Production | Operations Manager | Assures production workflows are executing correctly.  |
| Development | Developer | Authors templates, data models, graphical widgets, dashboards, workflows, forms, etc. |
| Production | Agent | Search/read access to customer documents, drives correspondence input and composition. |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Governance

## Review and Approve

Please describe any review and approve policies envisioned for outbound customer documents.

Please describe any review and approve policies envisioned for release management (a.k.a. moving projects from development into production). Include a description of every environment, and the stakeholders that will act as gatekeepers to each environment.

Please describe any review and approve policies envisioned exclusively for the production environment (e.g. marketing advertisements).

## Other Governance Policies

Please describe any important governance policies, relating to security, approval, quality management, etc.

## Shared Digital Assets

Please list the digital assets that might be shared across multiple documents, and the role that will be accountable to keeping these current and error-free.

|  |  |
| --- | --- |
| **Asset** | **Stakeholder** |
| Small Logo |  |
| Large Logo |  |
| Contact Information |  |
| Headers and Footers |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Division of Work and Deliverables

Please list the work items that might be provided by Ecrion’s professional services team.

◼ Deployment: installation and initial configuration

🞏 Deployment: Cloud configuration and operation (required for SaaS, optional for private cloud)

🞏 Templates (please provide samples if available)

🞏 Data Models (please provide schemas if available)

🞏 Workflows

🞏 Test and Validation Services

🞏 Customized Features (please describe each of the features, or attach document)

1. **Recovery Time Objective (RTO):** Typically measured in hours, RTO speaks to the maximum amount of time a given system will be down. So if you assign a 24-hour RTO to your content management system, that means if your CMS crashes at noon on Wednesday, your IT guys need to have it back online by noon Thursday. This metric is quite flexible as it may apply to storage operations, operating systems, and individual applications. [↑](#footnote-ref-1)
2. **Recovery Point Objective (RPO):** Typically measured in hours, RPO defines the maximum amount of data a given system can lose. Suppose you assign a one hour RPO to your customer relationship management system. That means you need to take backups at least every hour, and that you’re willing to part with only the data created between the last backup and the failure event, which, at the most, would be one hour’s worth of data. This metric can vary greatly depending on the application and may play a huge role in determining the order in which you will restore your systems. For a closer look at RPO, check out “[The Complexities of RPO](http://www.storagecraft.com/blog/complexities-of-recovery-point-objective/).” [↑](#footnote-ref-2)