**Statement of Work**

**Prepared for Bob Andrews,** Business Analyst

# Overview of Project

Acme provides benefits and claims administration solutions to their clients. As a service provider, Acme has a complex document production business process, as efficiency and client-specific customization are both requirements.

This is a pilot project that will demonstrate how the Ecrion EOS CCM solution can provide significant efficiency gains internally, as client-specific documents are authored, composed, reviewed, delivered, and maintained.

# Project Scope

## Deployment Architecture

This Pilot will be implemented on an Ecrion server, and remote access will be granted to the Acme staff during the life of the Pilot.

## Capacity

### Desktop Design Studio

EDS trial licenses will be provided to Acme staff as requested.

### Web Access

Approximately 10 Acme staff members will be accessing the EOS Pilot, in various roles as users, authors, integrators, and operations staff. Login credentials will be added to the environment as requested.

The EOS customer portal will not be activated for this demonstration.

### Document Production

This Pilot will be limited to correspondence use case. Production requirements will be minimal, as only one or two documents may be in production simultaneously.

## Documents

One document is included in this Pilot, as described in the following table.

|  |  |  |  |
| --- | --- | --- | --- |
| **Document Name** | **Delivery Channels** | **Format Requirements** | **Workflow Name** |
| COBRA Offering Notification | Disk | PDF, Word  Reproduce sample, bringing together three data sources:   * Brand attributes * Database fields * Form data | COBRAOffering |
|  |  |  |  |

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

|  |  |  |
| --- | --- | --- |
| **Workflow Name** | **Type** | **Processing Requirements** |
| COBRAOffering | Interactive | Production of this document will orchestrate the collection of data, query for supporting data, and brand attributes, and bring those sources together for rendering the document.  After rendering the document in PDF, the output will be placed (with index file) into a special “ECM” folder, as a stand-in for subsequent ECM integration.  This same workflow will apply to updated documents. New document versions will be delivered based on previous versions, or without any previous versions. |
|  |  |  |

## Delivery Channels

The EOS repository will have a special folder designated as the delivery channel. This will be a stand-in for a subsequent project to integrate with a downstream ECM component.

## Customer Management

The EOS customer portal will not be enabled.

Customer information will not be synchronized with EOS local storage.

## Integration Points

### Data Sources

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

|  |  |
| --- | --- |
| **Source Name** | **Access Technology** |
| Brand Profiles | Spreadsheet Extraction |
| Sample XML (CobraOffering.xml) | XML parsing |
| Benefit Package | Interactive Form |
|  |  |

### SMTP Server

Exchange Server will be used for internal Email integration, for task management and notification purposes. No customer-directed Email will be generated.

### Hot Folders and Message Queues

No integration with MSMQ message queues or hot folders is anticipated.

### Identity Management

#### EOS User Identity

For the Pilot, EOS will host all account credentials. Integration with the Acme identity management architecture is not included in this project.

#### Account/Customer Identity Management

EOS account and contact credentials will not be utilized.

### REST API

The REST API documentation will be provided to Acme for their evaluation. Any client application integration Acme undertakes to interface to the Pilot will be supported. (e.g. application login credentials, technical support on API utilization, etc.).

No specific REST API integration is identified at this time.

### Web Server/URL

URL integration is an important part of this Pilot.

Acme staff will modify their desktop application to display the HTML generated by the EOS solution. The document production form and the document preview, as generated by the EOS web server, will be presented to the application user through this URL interface.

The application will submit a URL request that results in opening the “correspondence” session between the application and the EOS server, and will also pass parameters already known to the application (e.g. customer name). The intent of parameter passing is twofold:

1. Don’t frustrate the user by asking for information that can be obtained from context
2. Assure security boundaries are not crossed (e.g. submitting documents using false identities)

## EOS Access Roles

The following table list critical roles envisioned for the EOS solution.

|  |  |  |
| --- | --- | --- |
| **Environment** | **Role** | **Duties** |
| Evaluation | Environment Administrator  (Ecrion staff) | Configure users, groups, environment variables, and connections to databases, servers, etc. |
| Evaluation | Operations Manager  (Both Acme and Ecrion) | Assures production workflows are executing correctly. |
| Evaluation | Author  (Ecrion primary, Acme also) | Authors templates, data models, graphical widgets, dashboards, forms, etc. |
| Evaluation | Agent  (Acme) | Search/read access to customer documents, drives correspondence input and composition. |
| Evaluation | Operations analyst  (Ecrion) | Designs workflows to support business processes. |

## Governance

### Review and Approve

Review and Approve policies are not included in this Pilot.

### Other Governance Policies

The templates in this Pilot’s document production will support multiple brands. A spreadsheet will collect brand-specific attributes, and rendering will apply these according to the selected client.

# Division of Work and Deliverables

Ecrion’s professional services team will deliver the following project components:

◼ Deployment: Cloud configuration and operation

◼ Templates

◼ Data Model

◼ Workflows

## Ecrion Professional Services Quote

|  |  |
| --- | --- |
| Deliverable | Estimated Hours |
| COBRA Offer Template (w/ Components & CSS) + Form | 20 |
| Workflows & Communication (w/ Review & Approval), miscellaneous configuration. | 10 |
| Cloud Deployment/Setup/Admin | - |
| Data Model | 10 |
|  | 40 hours |
|  |  |
| Fixed Cost Pilot | **$3000.00** |

# Schedule

Ecrion will begin this project within 5 days of receiving the signed SOW, and endeavor to complete it within 15 days.

The Pilot, after being complete, will remain active for 30 days in support of ongoing evaluation and integration testing projects undertaken by Acme.

# Support

The deliverables for this Pilot project will be supported during the duration of the Pilot.

Completed work will be available for subsequent use during the production implementation project.

Indicate your acceptance with the delivery and costs by signing below:

**Vendor**  **Client**

Ecrion Software, Inc. Acme, Inc.

Signature Signature

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Errett Thomas Signee\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Director of Sales Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_