**Morpheus - Statement Of Work (SOW) draft 6-12-15**

1. **Problem Statement**

Current state is that test procedures are individual static document based, interpretation of protocol can vary, data collect/report assemble is not integrated, and there is no single, central repository for ISTA test reports.

* + - Test reports reside in many different locations
    - Test reports have different layouts and/or different formats
    - Manufacturers: Labor-intensive to locate/access specific reports
    - Packaging Suppliers/Carriers: Manual process to provide test reports
    - During “field investigations” data needed not readily available via mobile or laptop
    - Data mining inefficient or not possible
    - Inconsistency across multiple procedures (i.e. multiple pallet marshalling impact intensities)
    - Poor communication of test plan and damage boundary/acceptance criteria.

1. **Morpheus Proposal**

Implement a secure cloud-based, global, mobile, and web access workflow tool that has central data repository.

* + - Phased in approach for all test protocols – pilot with 3A
    - Create ability for ISTA members to access procedures from anywhere (How can we strengthen this point? “Project/test plan specific procedures”??? )
    - Create a modular approach to procedures where methods are referenced making future updates more efficient.
    - Create ability to use tool as step-by-step workflow in:
      * Packaged-Product Inputs (input/edited by shipper and/or test lab)
    - Product Details
      * Damage Criteria
    - Package Details
      * Dimensions
      * Weight
      * Exterior, interior, closure
      * Damage Criteria
      * Assessment to determine test levels
      * Conducting the test modules with visual guides and links for more info
      * Capturing in the tool - data/photos/movies and linking to that test module
      * Add comments and observation during that test module.
        + Has selectable standardized observation notes (i.e. “pass – not damage observed”) along with customizable text field.
        + Customizable text field can be loaded using Smart Device dictation “voice to text” feature.
      * Data and observation notes directly loaded into appropriate sections of standardized test report
      * Customizable reporting options
        + Same data as a customized output with 3rd party lab branding
        + Same data as a standard output to ISTA
    - Create ability to submit test reports directly to central repository (Cloud)
    - Be able to access of test reports controlled by test lab and customer
    - Be able to collaborate with ISTA staff before or during testing
      * ISTA to approve deviations prior to report being submitted

1. **Benefits**
   * + **Members**
       - Ubiquitous access; anywhere, anytime, quick and efficient
       - Simplifies, streamlines and speeds up the communication process
       - Enables automation of Test Lab reports resulting in process improvements and reduction in costs
       - Electronic work flow; less resources and faster
       - Global solution
       - Easy data mining
     + **Member Labs**
       - See Member benefits
       - Customer portal if doing ISTA work
       - Be able to collaborate with ISTA staff before or during testing
         * ISTA to approve deviations prior to report being submitted
     + **ISTA**
       - Additional revenue from annual ‘access/use’ fee
       - Improved Board image - Demonstrates ISTA is modern forward thinking
       - Enables standardization of test results / forms
       - Electronic work flow; less resources and faster
       - Supports our Global Membership
       - Greater visibility for all testing done by certified test labs
       - Added value for member labs to sell their clients on becoming members (customer portal)
       - New category of test labs???
2. **Approach Options**
3. Build in-house

Hire resources to develop tool and platform within ISTA

**Pros**: Tight control over IP and technology platform and ability to update and bug fix.

**Cons**: Expensive, longer time line, and not an ISTA core competency

1. Contract out

Hire outside firm to build tool and managed platform

**Pros**: Tight control over IP and ability to update and bug fix.

**Cons**: Expensive, tied to technology platform, could be long time line depending on scope creep, and not an ISTA core competency

1. Partner – shared revenue model

Create a partnership with technology/platform firm to leverage/build a tool and they managed platform to keep current. This would be a subscription/fee revenue model. ISTA and Partner will to determine appropriate spilt.

**Pros**: Partner funds development and maintenance costs, ability to update and bug fix, partner’s core competency, shorter lead time as partner’s revenue is impacted.

**Cons**: Less control over IP, tied to partner and their technology platform, could be long time line depending on scope creep, and not an ISTA core competency

1. **Project Morpheus Key Specifications**

The product is defined as a work flow tool based on ISTA test procedures.

**Changes, whether initiated by the ISTA Test Planner Workgroup or Supplier, need to be submitted, reviewed, and approved before any implementation by the ISTA Global Board.**

**Any cost changes that impact Morpheus must be reviewed and approved by ISTA Test Planner Workgroup and ISTA Global Board.**

## Project Requirements

| **Category** | **Performance Requirement** | Comments |
| --- | --- | --- |
| Application Platform | Must operate on   * Windows 7 and higher * Android OS 4.0 and higher * Apple iOS 7 and higher |  |
| Web based platform | Must operate on   * Google Chrome * MS Internet Explorer * Mozilla Firefox |  |
| Workflow Tool | Assessment to determine test levels |  |
|  | Packaged-Product Inputs |  |
|  | Conducting the test modules with visual guides and links for more info |  |
|  | Capturing in the tool - data/photos/movies and linking to that test module |  |
|  | Add comments and observation during that test module. |  |
|  | Has selectable standardized observation notes (i.e. “pass – not damage observed”) along with customizable text field. |  |
|  | Customizable text field can be loaded using Smart Device dictation “voice to text” feature. |  |
|  | Transparency of the inputs that are critical to the work program output |  |
|  | Revision control and ability to save work program for repeating tests |  |
| Data capture | Text and camera feature info is captured and transmitted to Cloud data base, link to correct section of test report |  |
| Data Storage | Cloud storage that has redundant backup |  |
| Test Report Output | Format sized to 8.5” x 11” paper, readable via web, editable MS Word document, and PDF |  |
| Data linkage | Data can be synced to other systems (i.e. sharepoint, access, excel, sql, etc) |  |

1. **PROJECT SCHEDULE AND MILESTONES**

Supplier is responsible for communicating status of milestones against Plan of Record (POR) schedule below on a weekly basis or as requested. Any date that moves beyond the Boundary Date specified must be reviewed and approved by ISTA Test Planner Workgroup, with penalties possible based on the terms of the Development Agreement.

In particular, Supplier shall complete the detailed schedule per each software build that the parties agree to in writing and confirm in advance. For these purposes, the writing may be in the form of an email or other agreeable written form. The schedule may be adjusted only at ISTA Test Planner Workgroup’s discretion, provided that ISTA Test Planner Workgroup’s consent will not be unreasonably withheld or delayed.

| **Morpheus Milestone** | **Owner** | **Plan of Record** | **Boundary Date** |
| --- | --- | --- | --- |
| Concept idea and select pilot Test Method to build | ISTA | date |  |
| Map out detailed workflow logic for tool | ISTA |  |  |
| Award of Business – Project Kickoff | ISTA |  |  |
| Project Kickoff at Supplier | Co-own |  |  |
| Project Requirements finalized | ISTA |  |  |
| Proto 1 |  |  |  |
| Schematic/workflow documents | Co-own |  |  |
| Concept working model | Supplier |  |  |
| Test software release and verification | Supplier |  |  |
| Verification results review & acceptance | ISTA |  |  |
| Engineering Build |  |  |  |
| Critical operational components defined | Co-own |  |  |
| Project schedule milestones & requirements defined | Co-own |  |  |
| First table index coded | Supplier |  |  |
| Secondary index elements coded | Supplier |  |  |
| Test software release and verification | Supplier |  |  |
| Verification results review & acceptance | ISTA |  |  |
| Design Validation build |  |  |  |
| Usability defined and refined | Co-Own |  |  |
| User interface refined | Supplier |  |  |
| Test software release and verification | Supplier |  |  |
| Verification results review & acceptance | ISTA |  |  |
| Production Release |  |  |  |
| Final version tested by ISTA Test Planner Workgroup and approved | ISTA |  |  |
| Final version tested by select ISTA round robin group and approved | ISTA |  |  |
| Final version released for web/MS Windows | Supplier |  |  |
| Final app version released for Android | Supplier |  |  |
| Final app version released for Apple IOS | Supplier |  |  |

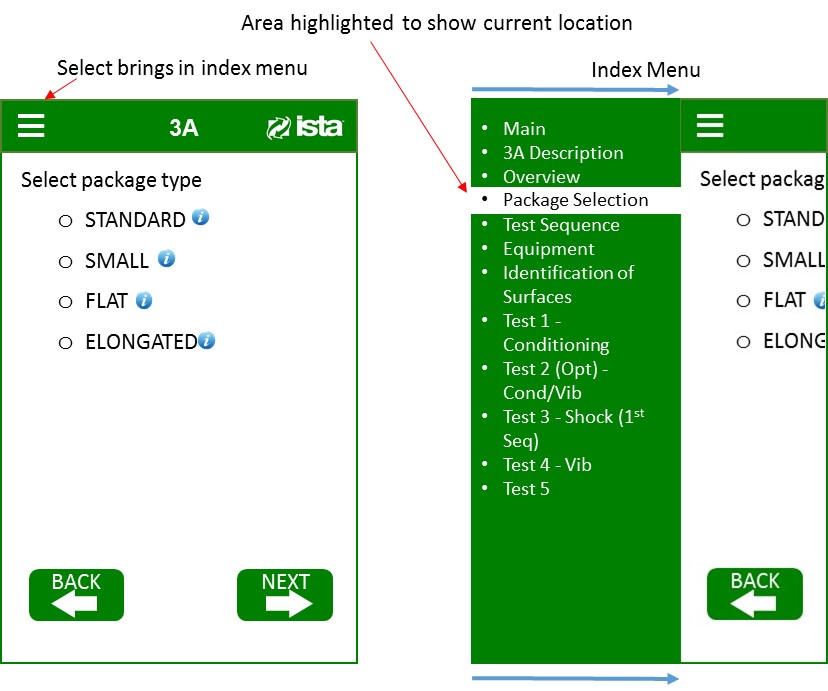
ISTA Test Planner Workgroup and the Supplier will hold regular design reviews prior to project milestones and release dates to ensure that all design and testing requirements are met per ISTA specifications. Design and testing reviews will include comprehensive data to evaluate any issues from the prior build, projects, or other sources, so that these can be corrected in the subsequent builds/milestones.

1. **KEY CONTACTS**

The parties hereby appoint the following individual(s) as the Project managers to act as the specified party’s primary point of contact for purposes of this Development Plan and the Project:

|  |  |
| --- | --- |
| **Supplier**  **Primary Contact** | **ISTA Operations**  **Primary Contact** |
| Name: | Name: |
| Title: | Title: |
| Office:  Mobile: | Office:  Mobile: |
| Email: | Email: |

**Concept images of digital device screen**

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