

VENDOR LOGO

[VENDOR]

Professional Services Proposal

Customer Registrar's Office:
Document Management
Consultation and Implementation

Version #

[DATE]

[VENDOR]
Records Management Department
[ADDRESS]

**** This proposal is valid for a period of 90 days from the above date.**

Table of Contents

Introduction	3
Proposal Terms and Usage	4
Project Areas	
Document Management Implementation	5
Description of Services	7
Description of Deliverables	8
Pricing Estimate	9
General Assumptions	10
Customer Responsibilities / Obligations	11

Introduction

The purpose of this document is to define the goals, scope, and important details supporting the delivery of professional services related to one or more projects defined in the Project Areas section. This document is used by [VENDOR] to provide services estimates applicable to the current stage of a project.

Proposal Terms and Usage

[VENDOR] is pleased to provide the following estimate for professional services related to the use of the (internally branded) Software ("Software") for Customer as shown in the Description of Services section of this document.

This proposal describes the services offered to Customer in conjunction with the use of the Software for Customer. The content of this document is subject to review and revision by both [VENDOR] and Customer. After this proposal has been mutually reviewed and agreed to by both [VENDOR] and Customer, this proposal will be attached to a services contract and delivered to Customer for final review and signature.

Once executed by both [VENDOR] and Customer, the [VENDOR] solution delivery team will contact Customer project team to discuss project logistics and potential start dates. Once a project start date has been determined, resources will be assigned and scheduled to begin delivery of the services described in this proposal.

Project Areas

Document Management Implementation

Scope

The Document Management solution offers the functionality to electronically manage documents associated with the department and its processes. As a part of the implementation the Registrar's Office will transition from keeping records on paper to using electronic search and retrieval.

The Registrar's Office consists of many separate documents that will be named during the discovery portion of the services.

- **Discovery**
 - The [VENDOR] resource will walk through the hierarchy of document storage within the Odyssey system.
 - The [VENDOR] resource will provide the customer with documentation on Metadata Schema structure and policy.
 - The [VENDOR] resource will describe security concerns and permissions to the Customer.
 - The [VENDOR] resource will describe Cross Referencing and its benefits to the Customer.
 - The [VENDOR] resource will describe keywords, Multi-Instance key groups, and Autofill keysets to the Customer.
 - The Customer and [VENDOR] will start filling in the Departmental Configuration Spreadsheet together so the Customer can get familiar with the structure.
 - The Customer will add to the Spreadsheet and contact [VENDOR] for consultation as needed.
 - The Customer will provide [VENDOR] with an export for any autofill keysets required.
 - The [VENDOR] resource will provide examples of Directory Import Processing (DrIP) and Document Import Processing (DIP) files for indexing.
- **Implementation**
 - The [VENDOR] resource will configure the Configurable Objects in the test (TEST) software.
 - The Customer and [VENDOR] will configure the digital documents and any DIP or DrIP files for migration.
 - The [VENDOR] resource will configure the DIP or DrIP schedule within the TEST software.
 - The Customer and [VENDOR] will test the DIP or DrIP processes in the TEST software.
 - The Customer will test the configuration within TEST.
 - The [VENDOR] resource will configure the Configurable Objects in the Production (PROD) software.
 - The [VENDOR] resource will configure the DIP or DrIP schedule within the PROD software.
 - The Customer and [VENDOR] will run the DIP or DrIP processes in the PROD software.

- The [VENDOR] resource will provide End User Training Classes in the TEST system.
- **Configurable Objects**
 - Document Type Groups
 - Document Types
 - Keywords Types
 - Multi-Instance Key Groups
 - Import Process
 - Autofill Keyword Set
 - Security User Groups
 - Cross References

Services

This project will include implementation services detailed in the Services section of this document.

Deliverables

The following deliverables will be included within the scope of this project:

- Software Solution
- 2 End User Training Classes
 - Up to 9 Students Each

Assumptions

- The solution will be implemented in one test and one production environment.
- The solution will consist of a minimum of 3 onsite visits from one resource from [VENDOR]. All other activities will be performed remotely.
- Auto-fill information will be populated via a flat file import from the Customer's SIS system
- Other integrations with the SIS system are not included within the scope of this project
- The Customer is responsible for generating a data feed from the student information system that will be tested and available for use prior to implementing the solution.
- The Customer's Information Technology department will configure server space for ongoing DIP or DrIP processes.

Description of Services

Implementation Services

Services include the implementation of a solution per agreed upon solution requirements that have been identified during the discovery phase.

- a. Configuration of the solution substantially in accordance with the mutually agreed upon documentation;
- b. Testing of Software modules and/or functionality implemented, per solution requirements
- c. User testing kickoff
- d. Issue support for solution testing
- e. Execution of two (2) "End User Training" sessions for up to nine (9) customer designated users per session
- f. Execution of administrative training specific to the solution

Description of Deliverables

Software Solution

The implementation of the requirements defined in the Departmental Configuration Spreadsheet.

End User Training Classes

Two classes of up to nine (9) users on the topics of Import and Retrieval within the Software. Batch scanning and indexing will be taught as needed. Import and Retrieval documentation provided at time of class and available online.

Pricing Estimate

Project Stage	Estimate Type		Amount
Discovery	Consultation	9hrs @ \$150.00/hr	\$1,350.00
Implementation	Disk Group Setup Fee	1 Group @ \$1,995.00	\$1,995.00
	Development - Migration	4hrs @ \$172.00/hr	\$688.00
	General User Support - Configuration	8hrs @ \$150.00/hr	\$1,200.00
	Training – 2 End User Classes	3hrs @\$120.00	\$360.00
Project Services	Project Management	4hrs @ \$160.00	\$640.00
Total			\$6,233.00

General Assumptions

The cost estimates were created using the following assumptions:

- a. [VENDOR] provides two (2) Classes for the training of Customer's end users.
- b. Project start date(s) are subject to a mutually agreed upon schedule after execution of contract.
- c. The above pricing estimate includes estimated services fees only.
- d. Each deliverable created during this project will use [VENDOR]'s standard deliverable templates. Customer requested changes to the deliverable template may increase project costs or introduce timeline delays. Customer subject matter experts, department managers, IT personnel and/or project management will be available and accessible for the duration of the project.
- e. The solution is intended to be implemented in a timeframe of contiguous weeks. Scheduling delays that impact the project timeline will result in changes to project cost.
- f. The project team will be established at the initiation phase of the implementation and will remain consistent throughout the project. Changes to project resources will affect the timeline and budget.
- g. Changes to the scope of the project that will have an impact on the budget will be handled by execution of a project change order.
- h. All invested parties will be available for the discovery and training sessions.
- i. Client is responsible for testing the solution and reporting issues to [VENDOR] during the test period.

Customer Responsibilities / Obligations

Network Environment

- A properly configured processing environment.
- All necessary components including, but not limited to, power, lighting, network connections and environment controls deemed necessary for the proper functioning of the system.
- Customer will provide systems access and include third-party vendors or subject /technical matter experts as required.

Personnel

- Appropriate members of Customer's project implementation team, including its assigned project manager, as needed for coordination and issue resolution.
- Availability of Customer's business process owners.
- Availability of Customer's technical resources responsible for the Software.
- At least one (1) Information Services ("IS") / Information Technology ("IT") representative to assist with the migration with regards to network and system administration.
- Availability of Customer's resource to coordinate the above listed resources.

The parties acknowledge and agree that the absence of the foregoing environment or personnel may result in the delay of the performance and completion of the services.