Scope Summary

The Santa Clara Stadium Authority (Stadium Authority) requires assistance with the configuration of a Laserfiche repository with the goal of digitizing and importing 165 boxes of physical Stadium Builder Licenses (SBLs). A 3rd party scanning vendor, BMI Imaging Systems, is responsible for the scanning and indexing of the physical files as well as prepping them in an acceptable import structure for Laserfiche. The import structure requires that index information be formatted in a LST file. BMI is expected to digitally deliver approximately 30 boxes worth of scanned files per week until the project is completed. Concurrently, the Stadium Authority requires ECS' services to import the scanned SBL files into Laserfiche and to provide Laserfiche training to staff who need to access the SBL records.

Scope of Work

The following scope of the project includes:

Professional Services

Project Initiation and Planning

PS1.   High Level Needs Assessment

- **High Level Tasks**
- Review and document hardware and software requirements for installation
    - o Repository Structure – Solution Design Review and Consultation
        - Review and consult on existing document taxonomy
    - o Security – Solution Design Review and Consultation
        - Review and consult on security configuration best practices
    - o Business Processes – Solution Design Review and Consultation
        - Discuss and review existing business processes to determine current use and propose new ways in the future to improve existing business processes with Laserfiche

Project Execution (Implementation)

PS2.   Repository Structure Setup and Configuration

- **High Level Tasks**
    - o Design and configure:
        - Folder structure
        - Naming convention
        - Template and field structure
        - User licensing and security
        - Volume structure
    - o Initial Solution Review and Revisions

- Review the solution with the Client to ensure original business process requirements are met
- Apply revisions to meet original business requirements and re-review
  - Sign off on solution

PS3. Workflow Automation: OCR Workflow
- **Solution Specific Details**
  - Configure a common OCR workflow activity to run after each batch of imported documents
- **High Level Tasks**
  - Detailed consultation on workflow requirements
    - Design and diagram the flow of the process
  - Design and Construction
    - Build initial workflow solution
  - Initial Solution Review and Revisions
    - Review the solution with the Client to ensure original business process requirements are met
    - Apply revisions to meet original business requirements and re-review
  - Sign off on solution

PS4. Laserfiche Software Training
- **High Level Tasks**
  - User Training – Search and Retrieval, Capture
    - Import and Capture Training
      - Laserfiche Scanning, Import Agent and Quick Fields (as applicable)
    - Search and Retrieval Training
      - Laserfiche Client, Web Access (as applicable)

Project Management, Control, and Closure
PS5. Project Management
- **High Level Tasks**
  - Professional project management services from ECS
    - Plan Project Development
    - Kick-Off Meeting
    - Ongoing Project Status Meetings
    - Ongoing Project Status Updates
    - Scope Verification
    - Risk Management (Contingency Plan)
    - Change Control
    - Schedule Control
  - Documentation

- Solution Documentation
- Training Documentation
- Lessons Learned

Optional Services

OS1. Document Import Procedure - Weekly Batch Imports (Up to 6)
- Import up to 6 batches of scanned documents with index information. The import will require a manual import procedure for every batch of files and their associated LST file.
- Run OCR workflow after every batch.

OS2. Project Contingency
- ECS recommends the Client includes an additional **10%** project contingency budget to offset unknown or unforeseen project variables based on general project management best practices.

Project Duration

The total project duration is dependent on several factors including but not limited to: resource availability, a delay in requirements, hardware limitations, scheduling, and other factors from both ECS and the Client. The project duration will be assessed at the time of the needs assessment and the development of the detailed project plan.

Items Out of Scope

The scope of this project does not include the following:
- ECS acquisition of server or workstation hardware
- Costs associated with troubleshooting OS or hardware issues related to the workstations or servers
- Resolving any issues not related to Laserfiche, including but not limited to Windows permissions, network permissions, network hardware, server or client hardware, or other 3rd party infrastructure hardware or software
- Any services not explicitly defined in the statement of services

*Any items out of scope will be considered as separate labor from the services agreed upon for this project and may require additional approval and review before proceeding. The project's primary requirements take precedence over any additional items requested that are out of scope to maintain the project timeline and ensure deliverable expectations are met.