

## **Professional Services Statement of Work For EnvisionWare Time and Print Management Suite**

### Introduction:

My objective for this project is to deliver, configure to specifications, install your new EnvisionWare products and provide training for operation and maintenance of your system. To meet this objective I will work with you for the duration of the project to understand your product needs and your desired staff and patron experience.

After reviewing this information please reply with your acceptance of the Statement of Work to the email message and address from which this message was sent (which contains an encrypted address via netsuite.com that is used for logging your response in our online system).

**IMPORTANT:** This document defines your acceptance criteria. After your acceptance of this document any change should be done in writing in the form of a Change Order, which can be implemented using a simple email exchange.

As we work through this project please check off each item as we progress. When we have completed all items on this list I will ask that you submit acceptance, which means that we have completed the agreed-upon tasks. For onsite projects this will occur when I prepare to leave. For remote projects it will occur during our final online session.

Acceptance of the project permits me to activate your support services for the solutions delivered. Please note that all project activities such as planning, installation, and training are scheduled in advance. In order to obtain timely assistance with any further questions or issues that may arise, it is necessary to accept the system and move into your support services agreement.

During the installation if we find certain minor issues that require follow-up, I will work with you to create a Support Case so that Support can work with you after this project. Please be assured that any unique qualities about your installation are being documented in our system so that Support can understand the nature of your installation and seamlessly deliver services after my closure.

### Project Scope:

- Project Planning
- Installation of Product(s)
- Product Configuration
- Staff Training
- System Administrator Training

### Project Milestones:

- Completion of Project Planning Phase
- Completion of Installation and Training
- Project Sign-off
- Transition to Support

### Product Scope:

This project will consist of installing the following modules:

- CloudNine
  - Cloud Setup
  - Staff
  - Self-service Reservation Station(s)
  - Web Module
  - Reporting Module
  - Clients
- LPT:One Print Management
  - Job Queue Engine
  - Administrator
  - Staff Print Release Terminal(s)
  - Self-service Print Release Terminal(s)
  - MobilePrint Service
  - Quick Reporter
  - Clients
- Launch Command
  - Kiosk menu

- Authentication and Accounting Module
  - MySQL backend
  - AAM Components (including Database Administrator)
  - AAM Web Query
  - Staff User Account Manager(s)
  - Self-service User Account Manager(s)
- Coin & Bill Acceptor
  - Integration with LPT:One Print Release Terminal
  - Integration with AAM User Account Manager

#### Assumptions about Customer Environment

The following existing configuration and setup is assumed as a prerequisite for the commencement of this project:

- ILS configuration of SIP2 or Patron API access for patron validation
- Host PC(s) for the above components
- Static IP address for any PCs hosting admin components listed above
- Network printers with static IP addresses

#### **Step By Step Outline of the Project and Responsibilities:**

##### PLANNING PHASE

In this initial phase we will work together to identify your objectives, discuss your environment, and plan the project. We will also be updating this SOW at the conclusion of the Planning Phase to reflect the exact criteria by which we measure success for the implementation services.

1. **GOALS:** The library will describe your goals for the outcome of this project. How will you use the software provided in this project and by what measure will you determine success?
2. **REQUIREMENTS:** The Consultant will introduce all requirements that must be met before this project can proceed to the installation, configuration and training phase.
3. **PREPARING FOR INSTALLATION:**
  - During an initial meeting I will provide an introduction to the Customer Center via GoToMeeting. I will demonstrate the resources and actions available and introduce product information as well as promotional materials that may assist you in planning your deployment.
  - The library will be asked to use Customer Center credentials (new users may be added) in order to access the EnvisionWare Customer Center, accept the EULA, and download the software to the appropriate PC hardware.
  - The library agrees to the use of EnvisionWare Quick Support remote access software activated on demand to facilitate remote configuration and support assistance. For projects traversing multiple, remote setup days the software may be installed permanently.

When the library and the consultant believe that all advance preparation is completed this planning phase will conclude at which time we will reconfirm the remote installation date and the training date.

##### IMPLEMENTATION PHASE

1. EnvisionWare will assist the library with the remote installation of the solution purchased.
2. EnvisionWare will train the library staff in the use of the system:
  - CloudNine
    - How the system delivers fair and equitable access
    - How the system protects patron privacy
    - The patron experience
      - @client sign up
      - Making a reservation at a self-service station
      - Signing into a session
      - Changing session options
      - Ending a session
    - Staff-managed reservations
    - Scheduling an Area for recurring reservations
    - Viewing reservations

- Marking a computer out of service
      - Manually extending patron time
    - LPT:One
      - The patron experience
        - Submitting a print job at the client
        - Selecting and releasing print jobs at the Print Release Terminal
        - Using each of the enabled payment methods
      - Staff-managed print release including override, cash over the counter
      - Running print reports with LPT:One Quick Reporter
    - Authentication & Accounting Module
      - Running an enterprise PC Use report with AAM Web Query
      - Adding funds via self service using AAM User Account Manager and a CBA
      - Managing users' AAM accounts with changed barcodes
3. EnvisionWare will train the administrator as follows:
- CloudNine
    - Changing preferences
    - Configuring computer access rules
    - Changing the schedule for a branch and for an Area
    - Customizing the text
  - LPT:One
    - Using the LPT:One Administrator
    - Assigning printers to printer families and Print Release Terminals
    - Changing print management general preferences
    - Customizing the text
  - System Administration
    - How to stay abreast of changes (Release Notes, Twitter and the Forum)
    - How to download and update software
    - What files to backup and when
    - How to replicate your settings for migration to a new computer or for deployment of a new location
    - How to use System Monitor to create a new case (or update an existing case) with a diagnostic capture
  - Customer Center
    - How to access the Customer Center
    - Signing up new users for the Customer Center
    - Viewing Release Notes
    - Review of the Customer Center Support Tab including:
      - Support and Maintenance Policy overview
      - Logging into Chat
      - Signing up for the Forum
      - Obtaining your account info, sales contact and other details
      - Downloading software and manuals