

Title:	Water Billing Documentation	Project:	OnBase-Water Billing documentation
Date:	08/03/2017		
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Proposed Change Description:

LEXserv has converted to a new water billing application (enQuesta) and is looking for a method to store supporting documentation related to customer accounts. Examples of such content includes, letters to customers, billing adjustment documentation, medical extensions, death certificates, adjustment letters, bankruptcy notices, POC documentation, installation plan letters, correspondence from customers, cash refund forms, etc.

In addition, VeBridge will determine feasibility to configure OnBase Application Enabler to provide access to OnBase documents from within enQuesta. If feasible, VeBridge will implement document retrieval access from an enQuesta screen.

Justification:

LFUCG has an enterprise wide OnBase document management system whose purpose is to store business documentation. To that end, the logical place to store the water billing related customer information is in OnBase; and provide access to appropriate users as needed.

Affected Requirements:

OnBase configuration and setup.

Impact on Cost:

The estimated cost to create this repository and provide access to OnBase documents from enQuesta is estimated to be 28 hours @ \$175 per hour for a total of \$4,900. See attached SOW for the details of work effort associated with the hours. Resolution # 566-2014, is the maintenance agreement, (valid through July 30, 2018) that will cover ongoing maintenance costs associated with this SOW).

Impact on Schedule

To be scheduled as soon as possible.

Impact on Resources:

To be scheduled.

Detailed Review Results:


Approved Defer Until: _____ Declined

Reasons/ Comments:

Payment Terms:

All items previously contracted will follow the contracted payment terms.

Final Approvals:

LFUCG – Revenue Department		VeBridge	
Name:		Name:	PAUL ENGEL
Position:		Position:	CEO
Signature		Signature:	
Date:		Date:	8/3/2017



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Statement of Work

LFUCG LEXSERV Solution Implementation



Statement of Work – LFUCG LEXSERV Solution

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Statement of Work – LFUCG LEXSERV Solution

Purpose:

This document will detail the work required to implement a basic OnBase solution for LFUCG LEXSERV document repository. The scope of this project will be to build the OnBase repository, document types, keywords, and required configuration for the LFUCG LEXSERV water billing documentation.

Discovery:

VeBridge will conduct a relentless discovery process in order to ensure a successful implementation of the solution. The discovery process will involve full analysis in all areas of the client work process, including:

- Document Analysis: Identify all document types utilized for LEXSERV.
- Document Data Analysis: Identify associated index/keyword information for each document type.
- Security Analysis: Determine the groups of users that will require access to the LEXSERV data. Identify the appropriate permissions for each user group to each document type.
- Storage and Capture Analysis: Determine the storage type within OnBase configuration and methods of capture (e.g. scan, upload, outlook, etc.).

VeBridge Environment Implementation:

The VeBridge environment implementation consists of the configuration of the OnBase software.

- Creation of Disk Group for Storage.
- Creation of User Groups and Users.
 - Application of appropriate permissions to each group.
- Configuration of a scan queue for future scanning or sweeping for documents into OnBase.
- Creation and configuration of Document Types as identified in the discovery process.
- Creation of keywords and association to the applicable document types.
- Creation of any custom queries required by users.

Statement of Work – LFUCG LEXSERV Solution

Training and Documentation:

As a part of the VeBridge solution implementation, training and documentation of the solution will be provided. This will include:

- **Training:**
 - Train the trainer session.
 - Training will include methods to access documents via document retrieval
 - Training will include methods to add documents to OnBase
 - Add from outlook email
 - Scanned files from desktop
 - Paper files
 - Electronic files (ie excel, pdf, etc.)
- **Documentation:**
 - OnBase Installation Report document which details all elements of the installed solution.
 - Reference document of the solution and its components.
 - Requirements document for validation of the solution design.

Application Enabler Implementation:

As part of the implementation, the OnBase Application Enabler module will be installed and configured. This module allows for interaction of retrieving documents from OnBase while working in a third party application. In this case, Application Enabler will be configured to retrieve documents from OnBase while in the enQuesta application (from one screen).

NOTE: The feasibility of this functionality has not been validated and will be determined at the onset of the configuration. If the functional requirement is not possible, VeBridge PM will provide immediate notification to LFUCG.

Statement of Work – LFUCG LEXSERV Solution

Level of Effort:

LFUCG Revenue Level of Effort	Hours	Resources	Total	TSK TTL HRS
Discovery				2
Discovery	1	1	1	
Document Discovery Analysis	1	1	1	
Configure OnBase Infrastructure				11
Configure Disk Groups and Scan Queues	1	1	1	
Configure User Groups and Security	1	1	1	
Configure Document Types and Keywords	2	1	2	
App Enabler Setup and Configuration (enQuesta)	6	1	6	
Test OnBase Solution	1	1	1	
Unit Testing				4
Develop Client Unit Test Plan	1	1	1	
Conduct Unit Testing	1	1	1	
Defect Identification & Resolution	2	1	2	
Demo of Solution				2
Demo of Final Solution	2	1	2	
Project Management				2
Project Management (Status Updates, Project Plan, etc)	2	1	2	
Training (End-user / Role Based)				2
Train the Trainer	2	1	2	
Go Live				1
Activation of Solution	1	1	1	
Closing				4
IT Hand-off (Solution Hand-off to Local IT)	0	0	0	
Solution Documentation	1	1	1	
30 Day Follow up	1	1	1	
Issue Resolution / Enhancement Implementation	2	1	2	
			28	