Carolyn Rice, Chair
Automatic Data Processing Board
451 West Third Street
Dayton, OH 45402

Dear Ms. Rice:

An Automatic Data Processing Board meeting has been scheduled for Wednesday, August 8, 2018 at 9:00 a.m. in the 6th floor Data Processing Training/Conference Room. The agenda will be as follows with supporting documentation attached.

(1) Minutes from July 11, 2018 meeting

(2) Treasurer’s Office – 2018 Tyler IAS World EZ-Scan Scanning Software and Hardware ($90,670.00)

(3) BCC-Information Technology – New Service Desk Platform with Professional Services ($106,312.45)

Sincerely,

[Signature]

KARL L. KEITH, Secretary
Automatic Data Processing Board

KLK/bru

Attachments

Cc: ADP Board Members
James Alford, Data Processing Director
Tina Ratcliff, Records Manager
Steven Hollon, Common Pleas Court Administrator
Kate Evans, Auditor’s Office
Lynn Cooper, Treasurer’s Office
Mary Montgomery, Prosecutor’s Office
Jonathan Rike, BCC IT
Chris Boyd, Data Processing
Cc: Steve Glardon, Data Processing
    Ellis Shockley, Data Processing
    Eric Armstrong, Domestic Relations Court
    Jennifer Petrella-Ahrens, Domestic Relations Court
    Tyler Small, Administrative Services-Purchasing
    Bart Kincaid, Sheriff’s Office
    Debra Harden, Recorder’s Office
    Dana Brown, Clerk of Courts’ Office
    Chris Williams, Coroner/Crime Lab
    Ann Bryant, Commission Office
    Edward McNachtan, Common Pleas Court
    Amy Wiedeman, Administrative Services
    Sam Blair, Auditor’s Office
    Richard Shively, BCC/IT
    Shawn Dunlavy, BCC/IT
    News Media
AUTOMATIC DATA PROCESSING BOARD MEETING
July 11, 2018

PRESENT:
Carolyn Rice, Chair
Karl Keith, Secretary
Bart Kincaid for Sheriff Phil Plummer, Member
Jim Dare for Judge Mary Katherine Huffman, Member
Dan Foley, Member
Russ Joseph, Member
Edward McNachtan, Common Pleas Court-General Division
Jonathan Rike, BCC IT
Connie Villelli, Clerk of Courts Office
Dana Brown, Clerk of Courts Office
Tina Ratcliff, Records Management
Lynn Cooper, Treasurer’s Office
Garth McLean, Development Services
Genae Yeldell, Development Services
Juanita Gainey, Development Services
Greg Sunshein, OMB
Chris Neary OMB
Phil Miller, Facilities Management
William Egperson, Facilities Management
James Alford, Data Processing
Steve Gardon, Data Processing
Ellis Shockley, Data Processing
Chris Boyd, Data Processing
Betty Upshaw, Data Processing Administrative Assistant

The Chair, Carolyn Rice, called the July 11, 2018 Automatic Data Processing Board meeting to order. (A copy of the agenda is attached hereto for reference.)

Agenda item number one was the approval of the minutes from the June 13, 2018 meeting. Karl Keith made a motion to approve the minutes. Motion was seconded by Russ Joseph. Motion carried unanimously.

The Secretary, Karl Keith, informed the Chair and Board members he had been asked to remove item number two from the agenda. The Chair said she was aware of the request to remove this item because agenda item number two was her office’s request. Ms. Rice apprised the Board they plan on bringing the item back before the Board next month.

Agenda item number three was a request from Development Services seeking the Board’s approval to purchase an electronic document management solution for $190,000.00 from Northwoods Consulting Partnership, Inc. Garth McLean, the department’s Workforce Manager, explained the solution would move them away from their paper files and
into the 21st century where they are managing their documents in real time. Mr. McLean said the appropriation of $190,000.00 would be over a three year period. After Mr. McLean’s presentation, Dan Foley asked him to explain the department’s process and function and how this solution would improve that function. Following this explanation, Karl Keith moved for approval of the request. Jim Dare seconded the motion. Motion carried unanimously.

The next agenda item (number 4) sought the Board’s approval of the Clerk of Court’s Office request to enter into a 60-months lease for seven (7) multifunction devices for the Court’s Legal Office with Modern Office Methods for an amount not to exceed $148,740.00. Connie Villelli, the Director of Compliant Special Projects, pointed out the information on the lease proposal was included in the agenda packet. She mentioned a comparison was done with the current County Millennium price agreement, and Modern Office Methods’ pricing was better for them for the type of work-horse machine they needed. When Karl Keith asked if this purchase needed to go out for bid, James Alford explained this purchase would be off a competitive bid contract per the Purchasing Department. After the presentation of the request, Dan Foley made a motion for approval. Motion seconded by Karl Keith. Motion carried unanimously.

Agenda item number five was a request from Facilities Management asking the Board to approve the purchase of a replacement 100 KVA Uninterruptable Power Supply (UPS) for the Data Processing Department at 451 West Third Street. William Epperson, the department’s Associate Engineer, stated he had been working with Data Processing to arrange the replacement of the current UPS which was installed in 2000 and has become problematic. Mr. Epperson said the purchase would be made from the vendor, Graybar, in the amount of $71,199.17 using the US Communities Purchasing agreement, EV2370. He reported an electrician would be hired through the competitive bidding process to remove and dispose of the existing UPS and install the new one at an estimated cost of $15,000.00. Following discussion about potential delivery and the installation dates, Karl Keith moved for approval of the request. Russ Joseph seconded the motion. Motion carried unanimously.

The last agenda item (number 6) was Data Processing’s request for the Board’s approval of the 2019 rate change for programming and technical services. Karl Keith pointed out that James Alford had passed out a document explaining the rate changes prior to the meeting. Mr. Keith apologized for not having this document available in the agenda packet. He explained the analysis had just been finalized on Monday. Mr. Keith explained the need for the rate change and how it came about as part of the General Government review
done in relations to the five-year financial plan. He reported one of things identified in this review was the need to adjust the DP rates as a way of an additional revenue source that could offset some of the costs they were trying to absorb. He further explained Data Processing staff and OMB staff performed an analysis of the current rates, which are $75.00 for programming services, and $65.00 for technical support services and have been in place since 2012. Mr. Keith apprised Board members, based upon this analysis which examined the department’s personnel costs and the number of hours allocated to these services; they recommended the rates be increased as follows in 2019:

New rate for Programming services: $108.00 per hour
New rate for Technical Support services: $76.00 per hour

Mr. Keith reported, with these new rates in place, it is estimated to generate $214,269.00 in additional revenue for the county’s General Fund. He explained these charges are made to Non-General Fund departments such as his office and BCC Non-General Fund departments such as Environmental Services. Mr. Keith said the Auditor’s Office would be the most impacted by the rate change since they pay over 60 percent of these charges, and he is okay with it. After the presentation of the request, Karl Keith made a motion for approval. The motion was seconded by Russ Joseph. Motion carried unanimously.

In other business, Karl Keith announced this would be Jim Dare’s last meeting. Mr. Keith reported Mr. Dare would be retiring at the end of the month. Board members thanked Mr. Dare for his services to the Board and wished him well on his retirement. Mr. Dare said his replacement, Mr. Steven Holland, had already been hired and will do a wonderful job.

There being no further business, Russ Joseph made a motion to adjourn the meeting. Motion seconded by Jim Dare. Motion carried unanimously.

Respectfully submitted,

KARL L. KEITH, Secretary
Automatic Data Processing Board

KLK/bru

Attachment
Carolyn Rice, Chair
Automatic Data Processing Board
451 West Third Street
Dayton, OH 45402

Dear Ms. Rice:

An Automatic Data Processing Board meeting has been scheduled for Wednesday, July 11, 2018 at 9:00 a.m. in the 6th floor Data Processing Training/Conference Room. The agenda will be as follows with supporting documentation attached.

(1) Minutes from June 13, 2018 meeting

(2) Treasurer’s Office - 2018 Reco Cashiering Software and Hardware Upgrade Purchase ($90,670.00)

(3) Development Services - Purchase of an electronic document management solution ($190,000.00)

(4) Clerk of Courts’ Office - 60 months lease for seven multifunction devices for the Clerk of Courts Legal Office (cost not to exceed $148,740.00)

(5) Facilities Management - Purchase of a replacement 100 KVA UPS for Data Processing Computer Room ($71,199.17)

(6) Data Processing - 2019 Rate change for Data Processing Services

Sincerely,

Karl L. Keith
Secretary
Automatic Data Processing Board

KLK/bru

Attachments
Ms. Rice  
Page 2  
July 5, 2018

Cc: ADP Board Members  
James Alford, Data Processing Director  
Tina Ratcliff, Records Manager  
James Dare, Common Pleas Court Administrator  
Kate Evans, Auditor’s Office  
Lynn Cooper, Treasurer’s Office  
Mary Montgomery, Prosecutor’s Office  
Jonathan Rike, ECC IT  
Chris Boyd, Data Processing  
Steve Glardon, Data Processing  
Ellis Shockley, Data Processing  
Eric Armstrong, Domestic Relations Court  
Jennifer Petrella-Ahrens, Domestic Relations Court  
Tyler Small, Administrative Services-Purchasing  
Bart Kincaid, Sheriff’s Office  
Debra Harden, Recorder’s Office  
Dana Brown, Clerk of Courts’ Office  
Chris Williams, Coroner/Crime Lab  
Ann Bryant, Commission Office  
Edward McNachtan, Common Pleas Court  
Amy Wiedeman, Administrative Services  
Sam Blair, Auditor’s Office  
Garth McLean, Development Services  
William Epperson, Facilities Management  
News Media
TO: James Alford, Director, Data Processing
FROM: Lynn Cooper, Chief Deputy Treasurer
DATE: July 31, 2018
RE: 2018 Tyler IAS World EZ-Scan Scanning Software

The Montgomery County Treasurer’s Office is requesting approval from the Data Processing Board for the addition of the EZ-Scan Scanning Software and Hardware to the existing cashiering system currently used. The total amount of the purchase will be approximately $90,670.00, paid from capital funds appropriated by OMB and the Treasurer’s General Fund.

The specifications and quote are attached for your review. The Treasurer’s current scanning software and hardware is at its end of life and must be replaced as soon as possible. The Tyler IAS World EZ-Scan Software and Hardware system will be an upgrade to our existing system and will eliminate multiple integration points between separate systems, remove existing dependencies to the very outdated old cashiering system, and allow for work flow efficiencies for both the Treasurer and Auditor’s office.

Please include this request for approval on the next Data Processing Board meeting. If you need any further information, please feel free to contact me at 496-3037.
Scope of Work Overview

EZ-Scan Scanning Software

Components that will be addressed with Customization to complete this interface replacement.

- Modify current ReCo/OnBase Interface.
- Batch Processing Scanning Speed for the County’s daily high volume processing of payments, we recommend that the EZ-Scan Database be in MS-SQL. EZ-Scan was developed for MS-SQL, thus we have seen better performance when in MS-SQL.
- Creating a custom Tax Payment Interface File to post Batched Payments into IAS. This will be put on-hold until we give the normal ReCo/EZ-Scan posting method a chance. We believe our normal method of posting will work just fine for the County. Thus reducing more customization hours.
- Create ACH File.
- Batch Interface - Importing Credit Cards payments and Electronic Checks.
- Pay-Ins – Scanning of the Checks a Back Room Function, as of now.

Four (4) on-site visits will be required to implement this interface replacement:

1. System Study/Review of Requirements
2. Install/Testing of EZ-Scan Software and Customization
3. EZ-Scan System Training
4. “Go-Live” in production
Scope of Work – Adding EZ-Scan to Existing ReCo Cashiering System

Montgomery County, OH CONFIGURATION

LOCAL REGISTER

EZ-Scan Operating System (new)
ReCo Command Files
Oracle 11GR2
32 Bit Client

Cash Drawer

Journal / Receipt Printer

EZ-Scan Scanner (new)

Mapped Network Drive

ReCo
ACUCOBOL
FLEXUS SP2
ReCo Objects
Interface Files

Network Printer(s)

Oracle Data Bases

IAS Data Base
ReCo Data Base

MS-SQL

EZ-Scan Data Base (new)
Scope of Work – ReCo Cashiering System

A. EZ-SCAN MODULES

The following software modules will be purchased for the installation and operation of EZ-SCAN

FOR (8) EZ-SCAN UNITS

RECO/ EZ-SCAN INTERFACE
EZ-SCAN PRO LICENSE
EZ-SCAN BARCODE/OCR PLUG-IN
EZ-SCAN A2iA CHECK RECOGNITION PLUG-IN
EZ-SCAN PRO SQL LICENSE

B. SOFTWARE CUSTOMIZATION

Customization services are determined by the client and NORTECH:

(100) Hours of software customization are included in the Scope of Work.

If the county needs more customization hours, the County will be billed a separate invoice at $150.00 per hour for extra customization that exceeds the original allotted hours.

The County is responsible for DBA tasks needed to set up ReCo/EZ-Scan in the County's ORACLE & MS-SQL data base.

The standard interface between EZ-Scan and ReCo Cashiering will be reviewed to assure compatibility with any custom features included in the County's existing ReCo cashiering system.

C. HARDWARE

The EZ-Scan Software Scanning Hardware is included for (8) Workstations. Includes the following:

(3) Cannon CR-190II Check Scanners @ $3595.00 each (includes one year warranty)
(5) Panini Vision 75-100 Check Scanners @ $1155.00 each (includes one year warranty)

The County would like to add an additional Extended Hardware Warranty after the first year expires. The Exchange Warranty on the above scanners is a three year exchange, next business day delivery.

(8) Scanner Exchange Warranty @ $320.00 each.
D. IMPLEMENTATION SERVICES

These services are included in the Implementation Cost:

- Detail consultation with client to review existing systems and procedures. One on-site trip.

- Setup of connectivity for all hardware associated with ReCo/EZ-Scan.
  * Note: Modifications and/or relocation of county’s existing facilities (furniture, countertops, etc) are not included in hardware setup. Nortech can only provide suggestions

- Software Installation/Testing.

- Project Management/Travel Expenses

The County will need to grant NORTECH remote access using [www.fastsupport.com](http://www.fastsupport.com) “Go TO ASSIST” for the initial setup.

This will expedite the implementation process and will also eliminate the cost of an on-site visit.

E. TESTING / TRAINING / GO-LIVE

Included in this service are three trips on-site at the client’s offices for:

- Training for the client’s personnel staff on RECO/EZ-Scan
- Nortech personnel on-site for the Go-Live of the ReCo/EZ-Scan Software

F. ANNUAL MAINTENANCE/ SUPPORT FEE (EZ-Scan)

This is a recurring charge that will be invoiced on an annual basis. PST (owner of EZ-Scan) requires an annual maintenance fee for EZ-Scan users. The fee is based on the number of EZ-Scan workstations.
Montgomery County, OH
PAYMENT SCHEDULE

Invoiced to the County upon signing Service Agreement $39,000.00

Item A. EZ-Scan License Modules
Item B. Software Customization (Initial 50%)

Invoiced to the County upon delivery of hardware $19,120.00

Item E. Hardware

Invoiced to the County upon completion of task $22,400.00

Item B. Software Customization (Remaining 50%)
Item C. Implementation Services: Set-up/Install/Training/Go-Live

Invoiced Thirty (30) Days after system is live $10,150.00

Item D. EZ-Scan Software Maintenance/Support

Grand Total – First Year $90,670.00

Note: See cost estimate for details
Montgomery County

COST ESTIMATE

Add EZ-Scan to ReCo

A. EZ-SCAN MODULES
   (8) Total EZ-Scan Units
      Interface- ReCo/EZ-Scan
      EZ-Scan PRO License(First License)
      EZ-Scan PRO License (7) Additional @ $1500 Each
      EZ-Scan BarCode/OCR PlugIn ($700 Per Unit)
      EZ-Scan A2iA Check Recog Plug-In
      ( Max 300,000 Documents Per Year)
      EZ-Scan PRO SQL Site License

   TOTAL SOFTWARE

B. SOFTWARE CUSTOMIZATION
   (100) Hrs @ $150.00/Hr

   TOTAL SOFTWARE/ SERVICES

C. IMPLEMENTATION SERVICES (Includes Four Trips)
   Set-Up, Install and Test
   ON-SITE for ReCo/EZ-Scan Go-Live

   TOTAL SOFTWARE/ SERVICES

D. EZ-SCAN SOFTWARE MAINTENACE/SUPPORT

   TOTAL MAINTENACE/ SUPPORT

E. HARDWARE
   Cannon CR-190Ii Scanner (3) @ $3595 ea
   Panini Vision 75-100 Scanner (5) @ $1155.00 ea
   3 Year Scanner Exchange Warranty $320.00 ea

   TOTAL HARDWARE

COST SUMMARY
   SOFTWARE / SERVICES
   HARDWARE
   SOFTWARE MAINTENANCE/SUPPORT (ANNUAL)

   TOTAL SOFTWARE/ SERVICES *

TOTAL

$31,500.00

$15,000.00

$14,900.00

$61,400.00

$10,150.00

$10,150.00

$19,120.00

$61,400.00

$19,120.00

$10,150.00

$90,670.00

* If Annual Maintenance Support
FAST, DYNAMIC CHECK PROCESSING

Deliver high performance, reliability, and image quality to production check processing with Canon’s imageFORMULA CR-190i II high-volume check transport. With a convenient countertop design and versatile document handling, the CR-190i II check transport can help meet even the toughest challenges.

WIDE RANGE OF USES
The CR-190i II check transport can assist in handling large volumes of checks to improve the efficiency of payment processes and treasury management in areas such as financial institutions, utilities, and other organizations. Many features of the CR-190i II check transport are ideal for high-volume remittance processing, lockbox, and back-office/branch capture. Bundled with the Silver Bullet Ranger API, this check transport can help ensure compatibility with virtually any check processing software application.

DYNAMIC AND RELIABLE PERFORMANCE
Capable of scanning up to 190 items per minute,* the CR-190i II check transport can perform real-time, dynamic, four-line endorsement. Equipped with a high-capacity, 250-item Automatic Document Feeder (ADF), it can reliably handle a wide variety of document types, including business and personal checks, thicker items such as rebate check cards, deposit and withdrawal slips, coupons, tickets, and envelopes. The CR-190i II check transport also includes two 200-item eject pockets that can be used individually or virtually combined to form one large pocket with output items “waterfalling” or alternating between each physical pocket for increased output capacity as required. These eject pockets are supplemented with an additional 50-item pocket for three-way sorting capability. The built-in jogger provides optimal item alignment to help eliminate misfeeds, and the ultrasonic double-feed detector helps to ensure no data is lost when double-feeds are detected.

PRECISE IMAGE QUALITY
The CR-190i II check transport builds on Canon’s high-precision optical technology expertise to deliver high image quality. Image processing features such as Fine Text Filtering allow for clear image capture with less distortion, resulting in better OCR accuracy. This scanner also uses magnetic/optical character recognition (MOCR) technology, which combines MICR reading with OCR processing, to help accurately capture MICR data. These features enable small details and other valuable check information to be captured and reproduced with clarity and precision.
EFFICIENT DESIGN
The CR-190i II check transport's countertop size and easy-access design allows it to fit into environments that are vigorous with activity. Durable materials, enclosed mechanics, and an easy-access paper path allow operators to conveniently perform basic maintenance tasks, such as changing the imprinter's ink cartridge, clearing jams, and cleaning the scanning glass.

ENVIRONMENT IN MIND
The CR-190i II check transport meets ENERGY STAR® guidelines for energy efficiency and complies with both the EU RoHS and WEEE directives for the reduction of hazardous substances and waste products. **

CUSTOMER CARE
For investment protection, eCarePAK options are available to extend service beyond the initial, one-year advanced exchange warranty period. This helps save on costs associated with post-purchasing maintenance and helps maximize uptime throughout the product life.

SPECIFICATIONS

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<tr>
<th>Type:</th>
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<tr>
<td>Document Feeding:</td>
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<tr>
<td>Document Size:</td>
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<td>Width:</td>
<td>2.7&quot; – 4.3&quot;</td>
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<tr>
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<td>4.7&quot; – 9.6&quot;</td>
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<tr>
<td>Document Weight:</td>
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<tr>
<td>Automatic Feeding:</td>
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<tr>
<td>Bypass Mode:</td>
<td>0.003&quot; – 0.02&quot; (17 – 112 lb. Bond)</td>
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<td>Feeder Capacity:</td>
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<td>Contact Image Sensor (CMOS)</td>
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<td>Scanning Speeds*</td>
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<tr>
<td>Simplex</td>
<td>Up to 190 cpm</td>
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<td>Duplex</td>
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<td>Power Consumption:</td>
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<td>Suggested Daily Volume:</td>
<td>24,000 Scans ***</td>
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<td>Bundled Software:</td>
<td>Silver Bullet Ranger Driver with IQA, Canon Scanning Utility Software</td>
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<td>Exchange Roller Kit, Imprinter Ink Absorber, eCarePAK Extended Service</td>
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* Examples based on typical settings, rated in checks per minute with 6" long U.S. personal checks at 200 dpi in black and white or grayscale.

** The facts and product statistics about EU RoHS and WEEE were obtained from Canon Electronics Inc. as of 2015.

*** Calculations based on scanning speed and assumed daily time of use.

WWW.USA.CANON.COM

As an ENERGY STAR® Partner, Canon U.S.A., Inc. has qualified this model as meeting the ENERGY STAR energy efficiency criteria through an EPA recognized certification body. ENERGY STAR and the ENERGY STAR mark are registered U.S. marks. Canon is a registered trademark of Canon Inc. in the United States and may also be a registered trademark or trademark in other countries. imageFORMULA is a registered trademark of Canon Electronics, Inc. All other referenced product names and marks are trademarks of their respective owners. Specifications and availability subject to change without notice. Not responsible for typographical errors. ©2015 Canon U.S.A., Inc. All rights reserved.

1015-CR190II-PDF-4H
Vision X

Providing all essential functionality required by distributed check capture, the Panini Vision X is the acknowledged world leading check scanning platform, with an unparalleled installed base.

The Panini Vision X...

🔹 Offers best-in-class reliability and lowest total cost of ownership for distributed check capture based on our core competencies of system scalability, MICR read accuracy, superior image quality, smooth document handling, and professional service. Coupled with a modern, ergonomic and accessible design, and quiet operation.

💡 Helps Financial Institutions take full advantage of image-based check truncation (Check 21 in the United States) in teller or branch applications, by lowering their operational costs and enhancing the customer experience.

📈 Can be further enriched - when used for teller image capture (TIC) - with the addition of Multi-Function System hardware modules (MFS), which provide a number of complementary teller functionalities while preserving ergonomics, footprint and integration.

🔗 Is equally efficient in Remote Deposit Capture applications, and in processing non-check documents such as utility bills, meal vouchers, coupons and more.

Reliability and Value.
The Vision X provides advanced check capture features and an industry leading price/performance ratio.

“Northern Trust needed a cost-effective, high quality check imaging solution that could accommodate the needs of multiple users, occupy a small space, and reliably handle a variety of transaction volumes in different branch locations. The results have exceeded our expectations.”

Michael Valdez,
Vice President, Northern Trust Personal Financial Services
Vision X

Advanced Printing Options

The Vision X offers advanced printing options suitable for various applications, ensuring flexibility and efficiency. Whether you need to print checks, invoices, or any other types of documents, the printer is equipped with features to meet your specific needs. It supports multiple media types, ensuring compatibility with a wide range of materials.

One or Two Pockets

The standard single pocket can hold up to 100 documents, ensuring sequence integrity. A two-pocket model is also available for applications requiring higher capacity. Whether you're dealing with small batches or larger quantities, the printer adapts to your workflow needs.

Ergonomic Feeder

The patented multi-feeder design allows for easy loading and unloading of documents, ensuring smooth operation and minimizing manual intervention. The feeder is designed to support a variety of document sizes, allowing for increased productivity and efficiency.

Scalability

Feeder capacity is designed to handle up to 100 documents per minute, resulting in high throughput and efficient processing. The printer is scalable, allowing for expansion as your needs grow.

Accurate MICR and Advanced Imaging

The Vision X is equipped with advanced MICR reading algorithms, ensuring accurate reading of check amounts and names. The printer supports various imaging options, including thermal imaging, allowing for flexibility in security applications.

Vision X shown with ergonomically integrated Multi-Function options for high-volume environments.

Multi-Function options include:
- Built-in scanner
- High-speed USB hub
- Optional smart card reader
- Roll tape thermal receipt printer

Vision X is also available with an all-in-one solution, providing a comprehensive set of features for your printing and imaging needs.

www.panini.com
Montgomery County
BCC Information Technology

To: James Alford, IT Director, Data Processing
From: Richard Shively, Senior IT Analyst, BCCIT
Through: Shawn Dunlavy, IT Manager, BCCIT
Date: July 31, 2018
RE: DP Board Request for Approval

Montgomery County BCCIT is seeking Data Processing Board approval to purchase a new Service Desk Platform. The software and training will be purchased from Service Now, Inc., located at 2225 Lawson Lane, Santa Clara, CA 95054 based off of State of Ohio (DAS) MCSA0013, Contract # 15708TB-MCOH and the professional services will be purchased from RoundTower Technologies Inc., located at 5905 E. Galbraith Rd., Cincinnati, OH 45236.

The total cost of this project will be in the amount of $106,312.45. See breakdown as follows:
- $50,778 per year for three (3) years for the software platform
- $8,380.00 one-time training
- $47,154.45 one-time professional services for implementation

This purchase will be made for the already approved 2018 BCCIT Budget using OCA codes 611613 and 611600.

Please include this request for approval on the next Data Processing Board meeting on August 8, 2018. If you need any further information, feel free to contact me directly at 937-824-4501.

cc: Amy Wiedeman, Assistant County Administrator, Administrative Services
    Jon Rike, IT Director, BCCIT
    Tyler Small, Director, Purchasing Central Services
    Bethany Colby-Lauffenburger, IT Manager, BCCIT
    Uchenna Youngblood, IT Program Manager, BCCIT
BCC IT Proposal
for
Service Desk Platform Acquisition

Created by:
Richard J Shively, BCC IT Senior IT Analyst
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  Contract and Cost: .............................................................. 6
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Solution requested by
- Jonathan Rike, Director of BCC IT
- Shawn Dunlavy, BCC IT Manager
- Uchenna Youngblood, BCC IT Manager
- Bethany Colby-Lauffenburger, BCC IT Manager
- Richard Shively, BCC IT Senior IT Analyst

Executive Summary
As a relatively new department with in the Montgomery county BCC IT has a significant need for an ITSM platform that can facilitate the management of day to day operations and IT projects. The current tool used by BCC IT to handle requests and incidents (City Works) is no longer sufficient for the needs of the department. The acquisition of Service Now will allow BCCIT to increase productivity by: incident deflection (use of suggested solutions through the service portal), auto-direction of tickets (through the service catalog for requests and incident categories on incidents), allowing customers to view/update their own tickets through the portal (as opposed to emailing which creates new tickets that then need classified and handled, aka creating duplicate work) and many other benefits listed in greater detail in the "What needs does this solution fulfil" section of this document.

The initial cost of this solution (based off state contract prices) is $59,158.00 which includes support, training and the product with a continuing annual cost of $50,778.00. If we would like to sign a 3-year contract, we will pay the $59,158.00 in the first year and then pay year 2 and 3 at $50,778.00 for a total 3 years and a total cost of $160,714.00.
What needs are being fulfilled by this acquisition

The current ticket system being used by BCC IT was not designed to be used as an ITSM platform, but was repurposed to do so, as such it has many limitations of functionality that any ITSM platform would come with out of box. Currently all tickets are managed via email only, this is because the system is too complicated for customers to create their own tickets. Additionally, they are not able to track their tickets other than by email or phone. The IT staff must classify each ticket as to whether it is an incident, request or change which increases the time for identification of major incidents and outages. Creation of tickets and administration of tickets require multiple screens. Due to the complexity and repurposing of the application reporting on data within the system is problematic.

With the acquisition of Service Now we will be able to address the difficulties we have faced with our current tool and allow for the possible growth of the application into other currently undefined areas.

Service Now will allow customers to become more independent through the service portal allowing them to submit requests for services and create incidents, during the creation of an incident they will be empowered by being given the ability to resolve known issues themselves with suggested solutions that walk them through how to resolve some common issues (they will always still have the option to continue to submit the original incident and provide feedback on proposed solutions). In addition, customers will be able to track the progress of their incidents through the service portal as well as add additional comments or possibly cancel request/incidents that are no longer needed. With the mobile app customers can not only create, update and view tickets but also take pictures with there phone and attach them to tickets (to show broken devices or maybe bluescreen errors). As always customers will still be able to use email to create incidents, respond to tickets and receive update notifications on communication from the support team or changes to their tickets status.

Service Now will allow support teams to easily communicate to customers via the ticket, which is logs all such communication and updates. They will also be able to make 'worknotes' which are only visible to other support staff and would include technical details the customer does not need to bother with but could be useful if the issue occurs again or is being handle off to another support team. Less time will be spent on determining the classification of a ticket as they will automatically be classified when created. Incidents will be routed to default groups when they are categorized by the service desk staff, but requests will be submitted through the service portal and will automatically be routed through the appropriate workflow and assigned to the group that fulfills that kind of request. Additionally, via the mobile app support staff will be notified (via push notifications) of new tickets assigned to their group, they will also be able to through the mobile app or email update or resolve incidents. Support staff will also be able to create knowledgebases for their groups/teams and determine if these articles can be seen only to their own group/team or if they will be available to all teams or even open to customers.

With Service Now we will also be able to dashboarding in the application and even the ability to create your own custom dashboards, showing things like statistics, tickets assigned to or opened by you and other quick views of information relevant to they user. BCC IT will be able to do asset management out of the central asset management application built into Service Now and may even be able to interface with the state's asset inventory as well. Custom reporting for all application in Service Now is a built-in feature.
We will also be implementing the Service Now project management application which will allow project managers to more efficiently manage their projects, tracking progress and resources, updating milestones, allows for better visibility of resource utilization levels and a project road map for strategic planning at an executive level.

Finally, with many other plugins and features available we hope to continue to grow and offer more solutions across the county.
Stakeholders
Major Stakeholders
  • BCC IT

Secondary Stakeholders (current incident/request creators)
  • Departments supported by BCC IT

Initial training and annual costs
All pricing is from the quote, ORD0975930-1, from Service Now SLED team which is based on the state contract MCSA-0013 as such all prices are good for the duration of the state contract.

For the initial acquisition we are looking at a total investment of $106,312.45, which includes:
$50,778.00 for the ServiceNow platform (which includes: 60 fulfiller licenses at $45/ea., 50 approver licenses at $15.63/ea. and 250 discovery nodes at $3.00), $8,380.00 for training (from ServiceNow), and $47,154.45 to have RoundTower, a trusted implementation partner with Service Now, assist with the initial implementation. After the first year we will have a continuing annual cost of $50,778 for the ServiceNow platform, licensing and support.

Contract and Cost:
  • **State Contract:** MCSA-0013
  • **Licensing:** $50,778.00
  • **Training:** $8,380.00
  • **Implementation:** $47,154.45

What is included in licensing costs:
  • ISTM Core
  • Project Management
  • Governance Risk & Compliance Management
  • Field SM (from the facilities management component)
  • Platform (Custom Application component)
  • Discovery
  • Approvers
# Order Form

ServiceNow, Inc.
2225 Lawson Lane
Santa Clara, CA 95054

**Order Number**
ORD0988704-1

<table>
<thead>
<tr>
<th>SNC Account Exec</th>
<th>Mike Sinko</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>+16692623628</td>
</tr>
<tr>
<td>E-mail</td>
<td><a href="mailto:mike.sinko@servicenow.com">mike.sinko@servicenow.com</a></td>
</tr>
</tbody>
</table>

## Customer Invoice Address

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Montgomery County Ohio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>451 W 3rd St Fl 3</td>
</tr>
<tr>
<td>Suite</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Dayton</td>
</tr>
<tr>
<td>State/Province</td>
<td>OH - Ohio</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>45422-0001</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>AP Contact Name</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td></td>
</tr>
<tr>
<td>Account #</td>
<td>ACCT0005114</td>
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</table>

## Customer Ship To Address

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Montgomery County Ohio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>451 W Third St, Fl 3</td>
</tr>
<tr>
<td>Suite</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Dayton</td>
</tr>
<tr>
<td>State/Province</td>
<td>OH - Ohio</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>45422-0001</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>Business Contact</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
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<tr>
<td>Tax ID#</td>
<td></td>
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</tbody>
</table>

## Reference Contract #(s)
15708TB-MCOH

## Contract Details
State of Ohio (DAS): MCSA0013

## Currencies
USD

## Payment Terms
Net due in 30 days

### Product Code

<table>
<thead>
<tr>
<th>Product Code</th>
<th>Subscription Product Name</th>
<th>Type</th>
<th>Units</th>
<th>Term (mos)</th>
<th>Term Start Date</th>
<th>Term End Date</th>
<th>Net Price (Monthly)</th>
<th>Net Price (Annual)</th>
<th>Net Price (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROD00533</td>
<td>ServiceNow® ITSA</td>
<td>Fulfiller User</td>
<td>60</td>
<td>36 Months</td>
<td>1 Oct 2018</td>
<td>30 Sep 2021</td>
<td>$ 45.00</td>
<td>$ 32,400.00</td>
<td>$ 97,200.00</td>
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<tr>
<td>PROD01032</td>
<td>ServiceNow® Discovery</td>
<td>Tier 1 (Up To 1999 Nodes)</td>
<td>250</td>
<td>36 Months</td>
<td>1 Oct 2018</td>
<td>30 Sep 2021</td>
<td>$ 3.00</td>
<td>$ 9,000.00</td>
<td>$ 27,000.00</td>
</tr>
<tr>
<td>PROD00170</td>
<td>ServiceNow® Approver User</td>
<td>Approver User</td>
<td>50</td>
<td>36 Months</td>
<td>1 Oct 2018</td>
<td>30 Sep 2021</td>
<td>$ 15.63</td>
<td>$ 9,378.00</td>
<td>$ 28,134.00</td>
</tr>
</tbody>
</table>

**Subscription Product SubTotal** $ 50,778.00 $ 152,334.00

### Education, Knowledge and Other

<table>
<thead>
<tr>
<th>Education, Knowledge and Other</th>
<th>Units</th>
<th>Net Price (Per Unit)</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>ServiceNow® Discovery Fundamentals Training (3 days) - Public (per attendee)</td>
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<td>$ 2,095.00</td>
<td>$ 2,095.00</td>
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<tr>
<td>ServiceNow® ServiceNow Fundamentals Training (3 days) - Public (per attendee)</td>
<td>3</td>
<td>$ 2,095.00</td>
<td>$ 6,285.00</td>
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</tbody>
</table>

**Education, Knowledge and Professional Services Subtotal** $ 8,380.00

**Pre-tax Total** $ 160,714.00

**Estimated Taxes** $ 0.00

**Estimated Grand Total** $ 160,714.00
<table>
<thead>
<tr>
<th>Invoice Schedule</th>
<th>Invoice Date</th>
<th>Amount</th>
<th>Est Taxes</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Subscription Fee</td>
<td>Upon Signature</td>
<td>$50,778.00</td>
<td>$0.00</td>
<td>$50,778.00</td>
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<tr>
<td>Education Fee</td>
<td>Upon Signature</td>
<td>$8,380.00</td>
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<td>$8,380.00</td>
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<td>Annual Subscription Fee</td>
<td>August 31, 2019</td>
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<tr>
<td>Annual Subscription Fee</td>
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<td></td>
<td></td>
<td>$160,714.00</td>
<td>$0.00</td>
<td>$160,714.00</td>
</tr>
</tbody>
</table>

**Hosting Details**

- **ServiceNow # of Instances:** 1 Production 4TB Storage Limit, 1 Non Production 4TB Storage Limit
- **Instance Names:** mcohio, mcohiotest
- **Customer ServiceNow Admin:**
- **Email:**
- **Data Center Region:** United States
Storage Limit

If storage approaches the 4TB limit, the ServiceNow Cloud Engineering team will work with Customer to manage the instances below 4TB. If Customer’s instance cannot stay below 4TB, Customer shall purchase additional storage in 1TB increments on a per-instance basis.

Terms and Conditions

ENTIRE AGREEMENT. Customer’s use rights to the subscription products ("Subscription Service") set forth herein for the term ending on the term end date (the "Subscription Term") are governed by the reference contract number above, this Order Form and Customer’s initial order form for the Subscription Term (collectively, "Agreement"). Customer shall limit the types and number of subscription products, Customer developed applications, users and their permitted functions, and other use restrictions to those specified in this Order Form.

Payment Terms

If Customer issues a purchase order, any additional or conflicting terms appearing in a purchase order shall not amend the Order Form or the Agreement. Upon request, ServiceNow shall reference the purchase order number on its invoices (solely for administrative convenience) so long as Customer provides the purchase order at least fifteen (15) business days prior to the date of the invoice.

Please submit a PO for the amount set forth above to accountsreceivable@servicenow.com or fax to 877-824-0673 or ServiceNow, Inc., Attention: Accounts Receivable, 4810 Eastgate Mall, San Diego, CA 92121

PREPAID FEES FOR PROFESSIONAL SERVICES, EDUCATIONAL SERVICES AND EVENTS SHALL EXPIRE IF UNUSED WITHIN ONE (1) YEAR OF THE DATE OF ORDER, WITH NO REFUND OR CREDIT FOR UNUSED OR UNPERFORMED SERVICE HOURS.

PRICES ARE FINAL. THIS ORDER IS NON-CANCELLABLE AND, EXCEPT AS OTHERWISE PROVIDED IN THE AGREEMENT, NON-REFUNDABLE. The order is for the entire subscription term and is indivisible. Payments are due as per the invoice schedule. All remaining fees are due immediately if ServiceNow terminates for non-payment.

Prices are stated exclusive of taxes, duties and similar assessments on Customer’s use, which Customer agrees to pay, excluding taxes on ServiceNow’s net income. Taxes shall not be deducted from the payments to ServiceNow, except as required by law, in which case Customer shall increase the amount payable as necessary so that after making all required deductions and withholdings, ServiceNow receives and retains (free from any tax liability) an amount equal to the amount it would have received had no such deductions or withholdings been made.

When applicable, Customer must provide its VAT or GST identification number(s) on this Order Form for (i) the country where Customer has established its business and/or (ii) any other country where Customer has a fixed establishment. Customer shall use the ordered Subscription Service and Professional Services for Customer’s business use in the foregoing location(s).

Education, Knowledge and Other

Terms for Education Services offerings are set forth on www.servicenow.com/schedules.html

Product Overview

The ServiceNow Product Overview containing descriptions of the ServiceNow applications and platform services included in the Subscription Products as described in the attached ServiceNow Order Form Product and Use Definitions are posted on www.servicenow.com/schedules.html


**ServiceNow® Order Form - Product and Use Definitions**

**USER TYPE DEFINITIONS**

"User" means any employee or contractor of Customer or Customer Affiliate that is assigned a unique username and password and has a user profile in the Subscription Service designated as "active". Only Users may be given access to the subscription service by Customer. A use right may not be shared or transferred. Customer shall not use the subscription service in a manner that circumvents usage restrictions.

"Approver User" is any User performing any of the functions set forth in the table below for an Approver User. An Approver User may only perform the functions set forth in the table below for an Approver User.

"Requester User" is any User that performs only the functions set forth in the table below for a Requester User.

"End User" has the same use rights as "Requester User."

"Fulfiller User" is any User other than an Approver User or Requester User. Without limitation, a Fulfiller User is any User that performs any function other than an Approver User function or Requester User function, including those set forth in the table below for a Fulfiller User.

"Process User" has the same use rights as "Fulfiller User."

<table>
<thead>
<tr>
<th>FUNCTION / USE RIGHTS AUTHORIZED</th>
<th>USER TYPES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>REQUESTER</td>
</tr>
<tr>
<td>Create its own request</td>
<td>included</td>
</tr>
<tr>
<td>View its own request</td>
<td>included</td>
</tr>
<tr>
<td>Modify its own request</td>
<td>included</td>
</tr>
<tr>
<td>Search the Service Catalog</td>
<td>included</td>
</tr>
<tr>
<td>Search the Knowledge Base</td>
<td>included</td>
</tr>
<tr>
<td>Access public pages</td>
<td>included</td>
</tr>
<tr>
<td>Take surveys</td>
<td>included</td>
</tr>
<tr>
<td>Set its own notification preferences</td>
<td>included</td>
</tr>
<tr>
<td>View assets assigned to user</td>
<td>included</td>
</tr>
<tr>
<td>Access and post to Live Feed</td>
<td>included</td>
</tr>
<tr>
<td>Initiate Chat sessions</td>
<td>included</td>
</tr>
<tr>
<td>Participate in a Watch List</td>
<td>included</td>
</tr>
<tr>
<td>View a report published to them</td>
<td>included</td>
</tr>
<tr>
<td>Approve requests by email that are routed to user</td>
<td>-</td>
</tr>
<tr>
<td>Approve requests routed to user via system</td>
<td>-</td>
</tr>
<tr>
<td>Create any record</td>
<td>-</td>
</tr>
<tr>
<td>Delete any record</td>
<td>-</td>
</tr>
<tr>
<td>Modify any record</td>
<td>-</td>
</tr>
<tr>
<td>Drill through any report</td>
<td>-</td>
</tr>
<tr>
<td>Create any report</td>
<td>-</td>
</tr>
<tr>
<td>Delete any report</td>
<td>-</td>
</tr>
<tr>
<td>Modify any report</td>
<td>-</td>
</tr>
<tr>
<td>Perform development activities</td>
<td>-</td>
</tr>
<tr>
<td>Perform administrative activities</td>
<td>-</td>
</tr>
</tbody>
</table>
## Configuration and Development

Use of the Subscription Service for application configuration allows Customer to, with respect to the Subscription Products for which Customer has purchased usage, change the values of pre-defined fields, add new fields to existing tables, add new tables that provide additional attributes around the process, build workflow for the process, modify the UI and form layouts, create business rules, integrate with external data sources, and tailor the process through custom scripting. Application configuration is restricted to configuring the processes included in the purchased Subscription Product to meet the customers specific needs without materially altering the purpose of the Subscription Product or the types of business processes that it seeks to automate. If Customer intends to alter the purpose of the Subscription Product or the types of business processes that it seeks to automate, then Customer may develop that new application in a non-production instance and purchase a Custom Applications use right from ServiceNow to deploy that application on a production instance. Customer shall not access the Subscription Service to develop or use a competing product or service.

### Subscription Products

<table>
<thead>
<tr>
<th>Subscription Product Code/Name</th>
<th>Included ServiceNow Applications and Use Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROD00533 ServiceNow® ITSA Unlimited (Including CreateNow) - Fulfiller User</td>
<td>Incident Management; Problem Management; Change Management; Release Management; Asset Management; Request Management; Cost Management; Field Service Management (Work Management); Project Portfolio Management; Resource Management; Demand Management; Agile Development (Software Development Lifecycle); Test Management; Policy and Compliance Management and Audit Management (Governance, Risk and Compliance); Vendor Performance Management; Risk Management; and Platform Runtime (CreateNow Development Suite). Customer is granted the rights for Fulfiller User as defined in the User Type Definitions Section. The following application(s) became available according to the release indicated below. Field Service Management – Calgary Vendor Performance Management, Resource Management – Dublin Demand – Eureka Test Management – Fuji Risk Management, Platform Runtime - Geneva Agile Development, Policy and Compliance Management, Audit Management - Helsinki</td>
</tr>
<tr>
<td>PROD01032 ServiceNow® Discovery Application - Tier 1 (Up To 1999 Nodes)</td>
<td>Discovery Application. A Node is a physical or virtual server that is: (i) discovered by the Discovery Application; and (ii) assigned as a configuration item by Configuration Management (CMDB). Usage may not exceed the number of purchased Nodes.</td>
</tr>
<tr>
<td>PROD00170 ServiceNow® Approver User</td>
<td>Customer is granted the rights for Approver User as defined in the User Definitions Section.</td>
</tr>
</tbody>
</table>
ACKNOWLEDGED AND AGREED:

End Customer: Montgomery County Ohio

ServiceNow, Inc.

Signature: 

Name: 

Title: 

Date: 

Signature: 

Name: 

Title: 

Date:
WHY PARTNER?

Organizations are working with IT providers to explore, implement, and optimize in these areas:

- **MODERNIZATION**
  - Software Defined
  - Converged Infrastructure
  - Cloud Native
  - Predictive Analytics

- **AUTOMATION**
  - Continuous Delivery
  - Everything-as-a-Service
  - Service Mapping
  - Federated Security Operations

- **PROCESS & CULTURE**
  - Service Management & Ops Management
  - Extreme Programming
  - Enterprise Architecture
... Is to transform how our clients realize and deliver value from technology
WE DO THINGS DIFFERENTLY

The RoundTower customer experience is our most important offering. You will feel the difference the moment you engage with us. We begin by asking the right questions about your company, the state of your technology, and your business goals. We take the time to discover your IT environment, document its strengths and weaknesses, and validate whether it is meeting your present and future needs.

Our focus is on meeting business objectives with improved agility, increased quality of service, and lower overall expenses. This provides you with a new, strategic tool for driving advancement rather than just being viewed as another cost center.
## Implementation Overview - Phase 1

<table>
<thead>
<tr>
<th>Phase</th>
<th>Subscription Product Name</th>
<th>Estimated Hours</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Workshop</td>
<td>20</td>
<td>$4,566.96</td>
</tr>
<tr>
<td>1.2</td>
<td>Setup – ADFS Authentication</td>
<td>20</td>
<td>$4,566.96</td>
</tr>
<tr>
<td>1.3</td>
<td>Mobile</td>
<td>20</td>
<td>$6,296.05</td>
</tr>
<tr>
<td>1.4</td>
<td>Integration – Kronos – One Way</td>
<td>25</td>
<td>$7,870.07</td>
</tr>
<tr>
<td>1.5</td>
<td>Integration – JD Edwards – One Way</td>
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<td>$7,870.07</td>
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<tr>
<td>1.6</td>
<td>Portal</td>
<td>40</td>
<td>$9,133.91</td>
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<tr>
<td>1.7</td>
<td>Discovery</td>
<td>30</td>
<td>$6,850.43</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td></td>
<td><strong>180</strong></td>
<td><strong>$47,154.45</strong></td>
</tr>
</tbody>
</table>

**Month 1**

- 1.1
- 1.2

**Month 2**

- 1.4

**Month 3**

- 1.5
- 1.3

**Month 4**

- 1.6

**Month 5**

- 1.7

**Month 6**
ADDITIONAL PHASE 1 SCOPE DELIVERABLES

- Workshops – High level ITSM workshop and process review. Outcome will be stories to define implementation.
- Setup and Auth – This includes setup of an ADFS Integration with SAML 2.0.
- Mobile – Will provide interfacing with up to 10 processes / workflows in ServiceNow.
- Integrations – One way integrations to provide either data to or from the integrated systems.
- Portal – This is setup of the portal (branding, categories, etc.) and insuring the structure of the portal is functional. Does not include custom development of widgets.
- Discovery – Includes setup and verification of up to 4 discovery network scopes.
- Resources – RoundTower will define the people resources that will be used for delivery.
- Phase 1 is to proceed and be completed before Phase 2. If it is desired to have phase 1 and 2 run concurrently, there may be need to have a modification of timeframes or cost.
<table>
<thead>
<tr>
<th>Item</th>
<th>Initial Est. Cost</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1</td>
<td>$47,154.45</td>
<td></td>
</tr>
<tr>
<td>Overall Cost</td>
<td>$47,154.45</td>
<td></td>
</tr>
</tbody>
</table>

Notes:
- RTT recommends phased implementation for increased adoption
- RTT stages capabilities with the intent of being able to deliver to production
- Implementation pricing includes project oversight and hours for collaborative adoption planning
- RTT Recommends formal Administration Training for determined Administrators only. Train the Trainer training will be a part of adoption planning and implementation.
- RTT Provides Run-Book type documentation of the configuration. Generally using Knowledge Articles.
ENGAGEMENT OVERVIEW
Project Kickoff: Overview of Roles and Responsibilities, Timeline, and Engagement Model

Discovery Workshops: Staged to define the backlog of requirements/stories with Acceptance Criteria definition

Best Practice Guidance: We offer enhancement recommendations for existing processes and follow ITIL/Lean best practices if none exist.

Adoption Planning: We provide strategies for adoption and communication to optimize end user transition.

Configuration/Setup: We manage the configuration of the ServiceNow instance to requirements specifications from discovery workshops and iteration feedback sessions

Knowledge Transfer/Go-Live Support: We provide knowledge transfer of setup/configuration to local administrator(s) for ongoing management of the platform. RoundTower will also be available for Go-Live support for each production release planned
RoundTower ServiceNow Project

Period: 3/1/17-3/15/17

Accomplishments this period
- Conducted Discovery Workshop
- Sprint 1 Planning Session
- Defined preferred processes and high level configuration

Planned Accomplishments for next period
- Sprint 1 Planning session
- Prioritize Backlog
- Begin Sprint 1 – Schedule daily standup calls
- Integrate with Azure AD and load user data

<table>
<thead>
<tr>
<th>Project Milestones</th>
<th>Milestone</th>
<th>Start Date</th>
<th>End Date</th>
<th>Revised End Date</th>
<th>% Complete</th>
<th>Status</th>
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RIDAC (Risks, Issues, Decisions, Actions, Changes)

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<th>Type</th>
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<td>Rob</td>
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THANK YOU