

DocuSign Integration Scope	
<b>Description</b>	Provider will provide consulting Services and training to assist with setup of the DocuSign integration.
<b>Assumptions</b>	Customer is actively using Crystal Reports and has a Crystal license. Customer is currently using document templates and has been trained in document management. Customer has an active account with DocuSign.
<b>Limitations</b>	If Customer has SSO for their DocuSign account, they must be on 23.1 or higher for a successful integration. Customer will manage any communications required with DocuSign.
<b>Kick Off</b>	<p><b>Provider responsibility:</b> Internal handover and preparation Prepare for and hold a 30 minute remote kick off meeting</p> <p><b>Customer responsibility:</b> Ensure key project resources and stakeholders attend kick off meeting Ensure project scope is accurate and fully aligns to all business requirements Raise any risks, blackout periods for software release, resourcing plan</p>
<b>Discovery</b>	<p><b>Provider responsibility:</b> One 90 minute remote requirements gathering meetings with preparation and write up</p> <p><b>Customer responsibility:</b> Ensure key resources attend all discovery sessions Provide an understanding of business processes, data and requirements</p>
<b>Build</b>	<p><b>Provider responsibility:</b> Configure DocuSign account settings and users DocuSign sandbox configuration Provider access management review and adjustments Electronic Signature configuration Electronic Signature profiles configuration</p>
<b>Training</b>	<p><b>Provider responsibility:</b> Up to three 1 hour remote training sessions delivered by Consultant, sessions will be recorded Training is scheduled to be completed in no more than 3 weeks</p> <p><b>Customer responsibility:</b> Ensure appropriate users are selected and attend all training sessions All users will be expected to complete the designed curriculum in the Provider's Learning Center</p>
<b>Testing</b>	<p><b>Provider responsibility:</b> One 30 minute remote meeting to introduce an example test plan and the process to raise issues Provider will maintain their own internal issue log to track status and progress of issues raised.</p> <p><b>Customer responsibility:</b> Customer is responsible for preparing for and executing user testing, including creation of test plans, test cases, and test scripts. Ensure key resources attend all testing meetings Raise any issues found (that are within the scope of the SOW) via the issue log The testing phase will be no more than 3 weeks in duration</p>
<b>Launch &amp; Post Launch</b>	<p><b>Provider responsibility:</b> One 30 minute post launch support review meetings Project Closure Post launch activities will be completed in no more than 1 week</p> <p><b>Customer responsibility:</b> Ensure key resources attend all post launch support review meetings Raise any issues found (that are within the scope of the SOW) via the issue log template Complete customer satisfaction survey</p>
<b>Project Management</b>	<p><b>Provider responsibility:</b> Coordination of resources, activities, meetings in alignment with timelines and milestones Ownership of issues log and delegation of tasks</p> <p><b>Customer responsibility:</b> Nominated project lead Ensure key resources attend all weekly project review meetings to provide updates Coordination of activity and resources on customer side to align to project plan and schedule</p>
<b>Exclusions</b>	Custom development is not included in the scope of this Service Integration services are not included in the scope of this Service Once the build phase begins, any further requirements are considered out of scope Updates to word-merge templates and/or Crystal reports with DocuSign fields are excluded from scope
<p>Estimated length of project: 3 weeks</p> <p>Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.</p>	