

Statement of Work (SOW) - SaaS Conversion One-Time Services

Project Summary

Provider will work with Customer to complete the conversion of licensing on Customer's existing Enterprise database from legacy perpetual licensing to subscription-based (SaaS) licensing.

Assumptions

SaaS Conversion

Customer is fully onboarded in the Provider's Enterprise solution.
Customer's Enterprise database is licensed to the Provider's legacy perpetual licenses.
Customer has been informed of any feature changes, including any end-of-support feature, in the new SaaS licensing that may impact them and has accepted the new SaaS scope.
All Users and Roles exist in the Customer's database.

Limitations

SaaS Conversion

The Services will be configured with the features and capabilities of the current release of the Services.

Provider will not implement workarounds for deprecated features in the new SaaS licensing.
Customer's Production and Test databases must be on the exact same version, service release, and hotfix level at the time of conversion.

Scope of Services

Kick Off

Provider responsibility

- Internal handover and preparation.

Customer responsibility

- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.

Discovery

Provider responsibility

- Up to one (1) 60-minute remote requirements gathering meeting with preparation and write up.

Customer responsibility

- Ensure key project resources attend discovery session.
- Provide an understanding of business processes, data, and requirements.

Build

Provider responsibility

- Review general access management capabilities and best practices.
- Review existing users and user types (roles, features, etc.).
- Optimize user types (with appropriate SaaS features), as needed.
- Assign new SaaS features to roles to optimize user efficiency, access, and database/application security.
- Set up new licensing in Test environment for testing.
- Set up new licensing in Prod environment following testing.

Customer responsibility

- Provide master data in specified formats as requested.

Training

Provider responsibility

- Up to one (1) 60-minute remote training session on access management updates, session will be recorded.
- Training is scheduled to be completed in no more than one (1) week.

Customer responsibility

- Ensure appropriate users are selected and attend training session.

Testing

Provider responsibility

- One (1) 30-minute remote meeting to introduce an example test plan and the process to raise issues.
- One (1) 60-minute remote meeting to review and resolve any issues, with follow up.
- Provider will maintain an issue log to track status and progress of issues raised.

Customer responsibility

- 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 scope) via the issue log.
- The testing phase will be no more than one (1) week in duration.

Launch & Post Launch

Provider responsibility

- Internal handover
- Project closure
- Post Launch activities will be completed in no more than one (1) week.

Customer responsibility

- Raise any issues found (that are within scope) via the issue log.
- Complete customer satisfaction survey.
- Post Launch activities will be completed in no more than one (1) week.

Project Management

Provider responsibility

- Coordination of resources, activities, meetings in alignment with timelines and milestones.

Customer responsibility

- Nominate project lead.
- Coordination of activity and resources on customer side to align to project plan and schedule.

Exclusions

- Creation of new users or roles
- Data Import
- Data Migration
- Custom development, including crystal reports, EZWriter, and custom APIs.
- Integration services, including amending existing custom integrations (CRM, POS, Finance, etc.)

Project Schedule

The estimated timeline for this project is 6 weeks. However, Provider and Customer will create and agree to a joint project plan in writing (email acceptable). The plan is *an estimate* and subject to change upon mutual written agreement.