# CUSTOMER Mi-Co Pilot Agreement

Draft 9-20-2012

# Overview

Mi-Co will utilize its Mi-Forms system to build a pilot application for CUSTOMER’s division. The goal of this pilot is to automate existing paper form processes by utilizing mobile devices and software such that processes make information available to management more effectively and forms are completed faster and with a greater overall user satisfaction.

# Technical Implementation

This section describes the technical implementation for this pilot project both in overall environmental setup and specific form process implementation

## Environmental Setup

The expectation is that CUSTOMER’s IT will perform the majority of the setup of client and server devices. Mi-Co will assist with providing necessary specifications and support.

## Mi-Forms Server

The solution will be dependent on the deployment of the Mi-Forms Server application within CUSTOMER’s IT infrastructure. This application software and dependencies are as follows:

|  |  |
| --- | --- |
| **Requirement** | **Specification** |
| Physical Environment | One of the following:* Physical Server
* Virtual Server
 |
| Operating System | Installed Instance of one of the following:* Windows Server 2012 (x64)
* Windows Server 2008 R2 (x64)
 |
| Database Connectivity | Local or Remote access to one of the following:* SQL Server 2012 (Express Edition or higher)
* SQL Server 2008 (Express Edition or higher)
* SQL Server 2005 (Express Edition or higher)
 |
| CPU | If physical server:* Intel® Xeon® CPU X3430 (Quad Core), 2.4GHz or higher

If virtual server:* Provisioned as dual or quad core
 |
| Memory | 4+ GB dedicated |
| Storage | 100GB local or network based |
| Software | The following software must be installed:* Windows Server Roles:
	+ Application Server (with the following services)
		- .NET Framework 3.5
		- Web Server (IIS) Support
		- Windows Process Activation Service Support
		- HTTP Activation
	+ Web Server (IIS) (with the following services):
		- Web Server
			* Common HTTP Features
			* Application Development
				+ ASP .NET
				+ .NET Extensibility
			* Health and Diagnostics
			* Security
		- Management Tools
			* IIS 6 Management Compatibility
	+ Windows Server Features:
		- Ink and Handwriting Services
		- .NET Framework 3.5 Features
* Microsoft SQL Server 2005 Backward Compatibility Components
* Configured SMTP server access (either local or allowed via relay)
* Mi-Forms Server v8.8 or later
 |

For the purposes of this pilot, Mi-Co will supply evaluation licenses of the Mi-Forms Server that cover a user base consistent with the number of users (technicians and managers) in the pilot.

## Mi-Forms Download Center

The solution will be dependent on the deployment of the Mi-Forms Download Center application within CUSTOMER’s IT infrastructure. This application may be deployed on the same server described in the Mi-Forms Server section above without any additional dependencies.

## Mi-Forms Client

The solution will be dependent on the deployment of the Mi-Forms Windows Client application within CUSTOMER’s IT infrastructure. This application software and dependencies are as follows:

|  |  |
| --- | --- |
| **Requirement** | **Specification** |
| Physical Environment | Tablet PC hardware such as the Xplore Tablet |
| Operating System | Installed Instance of one of the following:* Windows 7 Professional (or higher) (x86 or x64)
* Windows 8 Pro (or higher) (x86 or x64)
 |
| Digitizer Capability | High quality inking digitizer  |
| Network Connectivity | Connectivity to the Mi-Forms Server application via HTTP protocol through the use of standard network hardware such as Wi-Fi, 3G, or 4G LTE. |
| CPU | Intel i5 or higher |
| Memory | 2+ GB  |
| Storage | 1+ GB |
| Software | The following software must be installed:* .NET Framework 3.5
* Mi-Forms Client v8.8 or later
 |

For the purposes of this pilot, Mi-Co will supply evaluation licenses of the Mi-Forms Client that cover a user base consistent with the number of users (technicians and managers) in the pilot.

## Forms Processes

Mi-Co will implement mobile form capture processes for the currently existing CUSTOMER processes:

* ABC
* DEF
* GHI
* ….

In all cases Mi-Co will use its Mi-Forms Designer product to create an electronic form representation of each existing form source. Mi-Co will utilize best practices in form design such that forms perform well on the chosen target hardware platform (e.g. based on display size). This includes techniques such, but not limited to:

* Splitting forms into more pages than their source materials
* Sizing fields correctly based upon device display size
* Utilizing constrained text fields to limit data entry to relevant character sets (e.g. alpha vs. numeric)
* Locking form fields or sections based upon user input to other fields
* Implementing validation rules to ensure form completeness and data validity

### CUSTOMER Expert Knowledge

As all form processes being automated as a part of this pilot were initially developed in CUSTOMER’s group, Mi-Co would like to utilize existing expertise. Therefore Mi-Co requests the following CUSTOMER resources be provided:

* Current versions of all process forms (electronic version, if possible)
* A designated contact for each process
	+ A single contact may be used across multiple processes as applicable
* IT resource to help specify prefilling data sources

### (Example of a) Workflow Request

All designed forms will be deployed to the Mi-Forms Server. Users will be created on the server using the Mi-Forms Server native authentication mechanism. These users will correspond to all users (technicians and managers) in the system and permissions will be set for each user such that users have access to an appropriate set of forms.

As the Mi-Forms Client synchronizes form templates with the Server, the forms will automatically be made available to each user. Each form process listed below then will begin with the user launching the Mi-Forms Client software, navigating to the **File🡪Open** menu item and starting a blank instance of the appropriate form type.

All forms when submitted by a technician will be routed to a queue on the Mi-Forms Server that is available to managers. Additionally logic will be added to each form such that manager(s) are notified when a form has been submitted by a technician. Manager(s) will then access the forms through the use of the Mi-Forms Client software on either a Desktop or Tablet PC. Each form will contain logic that allows the manager to update the form as appropriate and route it back to the initial technician or to an export state when it is complete. This workflow is generally depicted below:



### Data Export

As jobs may list an indeterminate amount of time, data will be exported from each form as a PDF when a manager approves that form. The location of these exports will allow managers to view and download them through the Mi-Forms Download Center’s web interface. These exports may be considered as intermediate exports. A combined PDF will be created of all job forms at a later time once a manager has marked a job as complete (see Job Completion below).

### Other Forms (named below)

# Measured Criteria

As a part of this project, Mi-Co would like to measure user experience. To do so, as a part of the pilot Mi-Co will provide surveys as described.

### Current Process User Experience

Mi-Co will develop, in conjunction with CUSTOMER’s division a user survey that analyzes various user experience criteria in the current process. CUSTOMER users will fill this survey prior to utilizing the new system and a statistical analysis of this data will be performed to gauge overall user experience.

### Mi-Forms User Experience

Mi-Co will utilize the same survey developed for pre-pilot user experience. CUSTOMER users will fill this survey after 2 months of utilizing the new system and a statistical analysis of this data will be performed to gauge overall user experience.

# (Example of) Success Criteria

This is a list of the specific functions that the software needs to perform. This table lists the criteria that will be tested to meet CUSTOMER’s requirements along with a definition of what success looks like.

|  |  |  |
| --- | --- | --- |
|  | **Requirement** | **Evidence of Success** |
| 1. | CUSTOMER Field Technicians can go paperless by completing forms on tablets. | The business forms specified above are able to be displayed and completed on the tablets of the Field Technicians. |
| 2. | CUSTOMER Field Managers can receive form data from the field electronically. | The business forms specified above are able to be displayed and reviewed on the PCs of the Field Managers. |
| 3. | The application will save the completed form in a specified format, to a specified location – these can be different on each form. | The business forms specified above are exported as specified above. |
| 4. | The saving/uploading/sending of the completed forms does require the user to be online. | The business forms specified above are able to be completed, saved, uploaded/sent while offline. |
| 5. | The application will allow for the form to be submitted/uploaded to one or more of the following: * + MIC supporting documents
	+ Email destination
	+ Central Storage Repository
 | The business forms specified above are submitted/uploaded to one or more of the listed destinations. |
| 6. | The solution has the ability to “push/sync” the newly created forms to the application on the UPD for use (local access). | The business forms specified above are sync’d to the UPD by Mi-Forms Server as demonstrated in the pilot. |

# Expected Timeline

The timeline below assumes “Month 1” begins at the time this agreement is signed and does not imply any specific calendar date.

**Month 1 Milestones**

* Form Design Work Begins
* Server Environment Configuration Begins
* Server Environment Configuration Completed
* Tablet Environment Configuration Begins
* Tablet Environment Configuration Completed
* Form Design Work Completed

**Month 2 Milestones**

* MSA Feedback received by Mi-Co
* Rollout occurs to pilot users

**Month 3 Milestones**

* Form usage continues

**Month 4 Milestones**

* Form usage stops
* Survey sent to pilot users
* Survey results collected and analyzed

## Software Cost

As previously noted, Mi-Co proposes to utilize evaluation software licenses for all form processes for the Mi-Forms Server and Client and thus CUSTOMER’s division will not incur any software licensing costs for this pilot for two months.

## Services Cost

Mi-Co proposes to build all form automation processes and surveys described in this document for no charge, absorbing the cost of our expert personnel working to make this project a success for CUSTOMER. Mi-Co will also aid in the deployment of all software as necessary and support no more than ten users in this pilot process without charge for up to 2 months.

Hardware and Internal CUSTOMER costs are the sole responsibility of CUSTOMER.

PILOT AGREEMENT

I have read and understand CUSTOMER’s and Mi-Co’s commitment to this pilot.

I understand that upon completion of a successful pilot as defined above, CUSTOMER intends to complete a purchase of Mi-Forms software for 5,000 Xplore tablets at the price quotes sent to CUSTOMER in August 2012.

Accepted and Approved by:

Mi-Co CUSTOMER

4601 Creekstone Dr., Suite 102

Durham, NC 27703

Email:info@mi-corporation.com

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name:\_ABC\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title:\_Senior Vice President\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_