



## Travis County Commissioners Court Agenda Request

**Meeting Date:** December 20, 2013

**Prepared By/Phone Number:** Lori Clyde/44205, Kent Hubbard/46458

**Elected/Appointed Official/Dept. Head:** Cyd Grimes

**Commissioners Court Sponsor:** Judge Biscoe

### Agenda Language:

**A. Declare Two Used Interactive Voice Response (IVR) Servers as Surplus and Authorize Trade-In for Purchase of Upgrade to Elections IVR, Pursuant to Section 263.152(A)(2) of the Texas Local Government Code**

**B. Approve Modification No. 3 to Contract No. 4400000249 (H.T.E. Contract No. CM080170LC), Mitel Technologies, Inc. for Interactive Voice Response System.**

- **Purchasing Recommendation and Comments:** Purchasing concurs with department and recommends approval of requested action. This procurement action meets the compliance requirements as outlined by the statutes.

In 2008, the County Clerk purchased an Interactive Voice Response System for the Elections Division. At this time they are recommending upgrading the system. The 5-year old servers are at the end of their useful life and will be traded-in to offset the cost of the IVR upgrade. The cost of the upgrade with the trade-in is \$40,198.00. The maintenance cost will not increase as a result of the upgrade.

- **Contract Expenditures:** Within the last 12 months \$18,824.45 has been spent against this contract.

➤ **Contract Modification Information:**

Modification Amount: \$40,198.00

Modification Type: Trade-in and upgrade

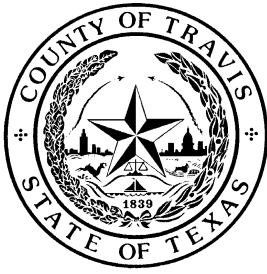
Modification Period: Beginning December 20, 2013

➤ **Funding Information:**

Funds Reservation #: 300000997

Funding Account(s):

Comments:



DANA DeBEAUVOIR  
Travis County Clerk

Elections Division  
P. O. Box 149325, Austin, TX 78714-9325  
5501 Airport Boulevard, Austin, Texas 78751-1410  
512-854-4996 (voice); 512-854-9075 (fax)  
[www.traviscountyelections.org](http://www.traviscountyelections.org)

August 12, 2013

TO:           Cyd Grimes, Purchasing Agent  
              Lori Clyde, Purchasing Agent Assistant

FROM:       Dana DeBeauvoir, County Clerk

RE:           Recommendation to replace IVR Server

The Travis County Clerk's office is recommending to replace and upgrade the IVR solution utilized for the Elections IVR (Interactive Voice Response) system. We are requesting permission to replace our current Elections IVR (Interactive Voice Response) equipment. The Elections IVR system currently utilizes 2 separate 5 year-old servers with specialized hardware and software. County asset tag numbers 141066 and 141067 are proposed trade-ins. These servers are at the end of their useful life. We expect the replacement system will eliminate problems encountered with the current deprecated solution and result in a better constituent experience. A single large server was purchased last month to take the place of these two previous servers. This request is for the specialized hardware and software that will be configured for the new server. The funds reservation number for this request is 300000997. The Travis County Clerk Elections Division recommends moving forward with this replacement.

**MODIFICATION OF CONTRACT NUMBER: 4400000249 (CM080107LC) Interactive Voice Response System**PAGE 1 OF 24 PAGES

ISSUED BY: PURCHASING OFFICE 700 LAVACA, SUITE 800 AUSTIN, TX 78701	PURCHASING AGENT ASST: <b>Lori Clyde</b> TEL. NO: (512) 854-9700 FAX NO: (512) 854-9185	DATE PREPARED: <b>November 6, 2013</b>
ISSUED TO: <b>Mitel Technologies, Inc.</b> <b>Attn: Kirk Powell</b> <b>2312 East Trinity Mills Road, Suite 100</b> <b>Carrollton, TX 75006</b>	MODIFICATION NO.:  <b>3</b>	EXECUTED DATE OF ORIGINAL CONTRACT:  August 12, 2008
ORIGINAL CONTRACT TERM DATES: <u>August 12, 2008 – November 30, 2009</u>		CURRENT CONTRACT TERM DATES: <u>December 1, 2012 – November 30, 2014</u>

**FOR TRAVIS COUNTY INTERNAL USE ONLY:**Original Contract Amount: \$ 116,922.00Current Modified Amount \$ 177,076.00

**DESCRIPTION OF CHANGES:** Except as provided herein, all terms, conditions, and provisions of the document referenced above as heretofore modified, remain unchanged and in full force and effect.

This contract is hereby modified to upgrade the Elections IVR as per the attached quote and Statement of Work.

The cost of the upgrade, including the trade-in for two servers, is \$40,198.00.

**Note to Vendor:**

Complete and execute (sign) your portion of the signature block section below for all copies and return all signed copies to Travis County.

DO NOT execute and return to Travis County. Retain for your records.

LEGAL BUSINESS NAME: _____	<input type="checkbox"/> DBA
BY: _____ SIGNATURE	<input type="checkbox"/> CORPORATION
BY: _____ PRINT NAME	<input type="checkbox"/> OTHER
TITLE: _____ ITS DULY AUTHORIZED AGENT	DATE: _____
TRAVIS COUNTY, TEXAS	DATE: _____
BY: _____ CYD V. GRIMES, C.P.M., CPPO, TRAVIS COUNTY PURCHASING AGENT	
TRAVIS COUNTY, TEXAS	DATE: _____
BY: _____ SAMUEL T. BISCOE, TRAVIS COUNTY JUDGE	



CUSTOMER CHANGE ORDER REQUEST FORM - ("CHANGE ORDER")

CASH

MOVE, ADD, CHANGE

Customer Name:	Travis County
Business Address:	700 Lavaca STE 800
City & State:	Austin, TX
Zip Code:	78701
Country:	USA
Phone:	512-854-4205
E-mail:	lori.clyde@co.travis.tx.us

Job Type:	MAC
Job #:	
System:	Mitel/V4N IVR UPGRADE
Sales Rep:	KIRK POWELL
Sales Date:	December 3, 2013
Branch Acct #:	
Requested Cut Date:	TBD

Purchase Order #: \_\_\_\_\_  
(if applicable)

Description of Work Requested: Election Jury IVR system is being upgraded the a SIP voice service and the work is to be done by Vocie 4 Net.

Work Requested					
Part #	Description	Qty	Product Price (\$)	Labor Price (\$)	Cash Total (\$)
IVR INSTL REM	Remote Installation (Shipping,configuraton, training and software Upgrade)	1		2,072.00	2,072.00
V4-IVR-SIP-MOD 7k	SIP/T1 TDM GATEWAY (DUAL T1)	1	7,437.00		7,437.00
V4 IVR Sip 24	IVR SIP Licenses 24 ports package	2	18,594.00		37,188.00
V4 IVR SIP MOD 3K	IVR MOD Election Conversion to SIP Platform	1	3,188.00		3,188.00
V4 IVR SIP S	IVR SIP Server software	1	5,313.00		5,313.00
	V4N Servers trade-in (to be returned to Mitel)	2	-7,500.00		-15,000.00
	Ref: Contract # CM080107LC, dated February 27, 2008 ("Agreement")				
				<b>TOTAL</b>	<b>40,198.00</b>

Customer will be invoiced in the amount of **\$40,198.00**, plus any applicable taxes will be forwarded.  
Payment terms: 100% due upon completion.

**TERMS**

1. This quote is valid for thirty (30) days from date of issue and is only for the products and services listed above. Changes or additions to this Change Order resulting in additional costs will be implemented only on the written authorization of Customer.
2. This Change Order is subject to the terms and conditions of the Agreement as executed by Customer and Mitel. Terms not otherwise defined in this Change Order shall be the meaning set out in the Agreement. In the absence of a valid agreement, Customer acknowledges and agrees that Mitel's standard terms of purchase, sales and service will apply to products and services provided hereunder, as applicable.
3. Execution of this Change Order by Customer constitutes Customer's acceptance of the terms above and notice to Mitel to proceed with the work described in this Change Order.

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

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



# Custom IVR Solution Project Plan

**Project Name** Travis County Election  
**Company** Travis County  
**Dealer** Mitel

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## Introduction:

## IVR project Overview

The document will serve as a roadmap of the V4N order fulfillment and project implementation process, including roles and responsibilities (V4N, Dealer, & Customer). To keep the project on time and under budget it is critical that all project stakeholders understand the roles of the team players. Multiple roles can be shared by a single team player. These roles and areas of responsibility include:

**Glossary:**

Abbreviation or Term	Notes
Travis County Elections	Customer
V4	Voice4net – IVR manufacturer & developer
Mitel	Reseller Company

**Project Stakeholders:**

In each project there are many team members that are relied upon to implement a successful custom project. For CTI projects we have identified the following roles and responsibilities to be the most helpful in defining prior to the project. Recognizing that in many cases, depending on the size of the organization, many of these roles will be filled by the same person(s). That is acceptable and many times required and may be identified in the contact sheet for each role. Below is a list of roles that be defined in the project.

**Customer Project Lead** - Primary Customer contact responsible for Customer deliverables and resources required for implementation/installation of the V4N Solution

**Customer Business Unit Manager** – Customer contact responsible for the business requirements which will be satisfied as a result of this project implementation

**Customer Call/Work Flow Owner** – Customer contact responsible for designing and documenting the call/work flow for each application

**Customer Telecom Contact** – Customer contact responsible for telecom providing existing call programming and connectivity

**Customer IT Lead** – Customer contact responsible for providing access to the various data elements required for the applications defined under this project

**Customer Voice Talent** – Customer contact responsible for recording the prompts associated with the applications defined under this project

**Customer QA Personnel** – Customer contact responsible for creating and executing a test plan to QA the applications defined under this project

**Other Customer Related Technical Staff** – Other personnel resources deemed necessary (e.g., Network; 3<sup>rd</sup> Party Vendor; Security etc.) for implementation of the V4N Solution.



IVR project Overview

**Dealer Sales Representative** - Primary Dealer contact to handle any new sales issues that may occur during the project implementation.

**Dealer Project Coordinator/Manager** - Primary Dealer contact for managing project implementation/on-site installation with Customer. This includes working with V4N Project Manager to assist in providing project updates and Customer deliverables, and coordinating local Dealer action items and resources required for implementation/installation of the V4N Solution.

**Dealer Installation Technician** - Primary Dealer contact responsible for on-site installation, Dealer and Customer acceptance testing.

**V4N Sales Representative** - Primary V4N contact working with Dealer Sales Representative to handle any new sales issues or change requests during project implementation.

**V4N Sales Engineer** - Primary V4N Technical Sales contact that assisted with the pre-sales technical design and requirements for the project. V4N SE provides continuity and ensures smooth transition from the pre-sales to post-sale implementation with V4N Engineering.

**V4N Project Manager** - Primary V4N contact responsible for coordination of all project activities and updates required for implementation of the V4N Solution.

**V4N Lead Engineer** - Primary V4N Engineering resource assigned to develop the V4N solution.

IVR project Overview

**Contacts:**

<b>Project Title</b>	<b>Name</b>	<b>Contact Info</b>
<b><i>Voice4net (V4)</i></b>		
Sales Contact	Richard McFarland	Phone: 214.237.7600 x7660 Email: <a href="mailto:rem@voice4net.com">rem@voice4net.com</a>
Sales Engineer		Phone: Email:
Primary Project Mgr.	Jim Colwell	Phone: 972-316-4029 Email: <a href="mailto:jim.colwell@voice4net.com">jim.colwell@voice4net.com</a>
Lead Engineer	TBD	Phone: Email:
<b><i>DEALER</i></b>		
Sales Contact		Phone: Email:
Project Coordinator		Phone: Email:
Operations Manager		Phone: Email:
Field Engineer		Phone: Email:
System Implementation Specialist		Phone: Email:
<b><i>CUSTOMER</i></b>		
Project Lead		Phone: Email:
Business Unit Manager		Phone: Email:
Work Flow Owner		Phone: Email:
Telecom Contact		Phone: Email:
IT Contact		Phone: Email:
IT Contact – Backup		Phone: Email:
Voice Talent		Phone: Email:
Quality Test Contact		Phone: Email:
<b><i>3<sup>rd</sup> PARTY CONTACTS</i></b>		
		Phone: Email:

## Project Deliverables:

These sections will describe the ordered and expected deliverables for the IVR project. The Hardware and Software sections describe standard or packaged items such as hardware, software licenses, software packages and other NON custom items that were ordered and will be delivered. The Custom section describes the customized modules developed by Voice4net, based on designs mutually agreed upon by the Customer and Voice4net.

### Hardware:

The customer is providing their own server which must meet the minimum configuration requirements listed under the *General System and Installation Requirements* section of this document.

***The server, provided by Customer, will require integration with the Customer's phone switch (PBX). Voice4net's involvement in any phone switch validation issues is limited to the initial validation of internet and inbound/outbound phone connectivity. The need for additional Voice4net involvement in PBX issues will incur additional per hour fees.***

**IMPORTANT NOTE: Trade in credit will be credited ONLY after the old servers have been returned in working condition with all original equipment installed.**

Mitel shall be solely responsible for all costs associated with return of the trade-in servers. At a minimum, Mitel shall arrange, at its sole cost and expense, for one of the following options: (1) pickup of both trade-in servers and delivery to a location of Mitel's designation; or (2) delivery to the Travis County Clerk's Office (Attn: Elections Division) of appropriate packing crates and related packing materials, as well as payment of all shipping, handling and insurance costs on the shipment.

IVR project Overview

**Hardware and Software Quantities**

Qty	Description
<b>Voice4net SIP Appliance Bundles</b>	
1	Customer Provided Server- See VM/Server Requirements
1	SIP/TDM Dual T1 Gateway
<b>Voice4net SIP Software Only Packages</b>	
1	IVR SIP Server Software License
2	IVR SIP License (24-port package)
<b>Voice4net Installation</b>	
1	Remote Installation Bundle

**Custom Modules:**

The table below describes the title and brief description of the custom applications that will be included in this project.

Module Name	Description
IVR Mod- Conversion to SIP platform	<p>This includes taking the existing “exact” call flow and voice files from the old T1 based IVR system and converting the call flow and voice files and database functions to the new SIP based platform.</p> <p>NOTE: this does NOT include any modifications to call flow, voice files or database procedures. Those will be quoted under separate cover as Change Orders to the project.</p> <p>Separate SOW document is not require as this project will ONLY include conversion of existing code to new SIP platform</p>

**PBX Specifications**

Make: Nortel (Avaya)

Model: CS1K

Version: ?

Ports: 48

CODEC Requirements: (T1 Gateway PRI to G.711 SIP)

## IVR project Overview

**Resource Requirements (estimated):**

The items below are a summarized version of the primary task items for the project. These are estimated and may change based on the options selected for purchase.

NOTE: all hourly estimates are shown in “man hours” and not calendar hours. Some steps will take several days depending on resource calendar availability but man-hours should be close to actual hours required.

<b>Task</b>	<b>Resource</b>	<b>Est. Hrs.</b>	<b>Notes</b>
System Build/Stage/Delivery	Customer	8.0	See Hardware Requirements
Network Connection	Customer	2.0	Ethernet cabling and connectivity for server. Static IP address for server. Ensure server can see outside world via browser (i.e. <a href="http://www.voice4net.com">www.voice4net.com</a> ) <b>The network must meet the minimum requirements as noted in the General System and Installation section.</b>
PBX Programming (If applicable)	Customer	2.0	Configure PBX with SIP Hunt Groups & DID for IVR. <b>The PBX must meet the minimum requirements as noted in the General System and Installation section. A test DID and extensions will be made available for testing of the V4N solution. Failure to do so will significantly affect project timelines.</b>
Remote Training & Production	Customer & V4	2.0	Preparation, training and production of application

## Project Schedule Overview:

V4N project implementation schedules and work queues are generally determined on a first-in, first-out basis. All estimated delivery turnaround times from V4N ~~are assumed to begin~~will begin on the date when all approved and executed contract and order documents have been received by V4N. V4N makes all reasonable efforts to adhere to its original implementation schedules. However, ***project schedules are subject to change based on V4N, Dealer and Customer resource availability as well as the ability of the Dealer and Customer organizations to meet their respective project responsibilities.***

The V4N Project Manager will provide the Dealer and Customer with project status updates on a regular basis in the form of a weekly project status call or email updates. Significant delays outside the control of V4N may result in the project being placed on hold and project resources being temporarily reassigned. Average project turnarounds vary based on project complexity and cyclic variation in the V4N development queue backlog. For planning purposes, a 60 to 90 day turnaround after receipt of executed contract docs should be anticipated until the V4N Project Manager supplies a project specific delivery estimate.

## Project Timeline:

Complete By Date	Resource	Item	Notes
TBD	ALL	Kick Off Conference	Discuss implementation plan and contacts
TBD	ALL	Contact Sheet Completed	Need all contacts for all stakeholders
TBD	ALL	Design Meeting	Conference between customer and developers to ensure understanding of diagram and specifications
TBD	Customer	Scope of Work Specifications	Call flow diagrams and notes associated with the caller experience for the new call flow of the system.
TBD	V4	Development Phase	Development of actual code based on specifications
TBD	V4	Testing Phase	Developer testing of the application
TBD	Customer	UAT	User Assessment Testing by the customer to ensure applications are operating per specifications
TBD	ALL	Production Meeting	Discussion on final cut over dates and strategy.
TBD	ALL	Admin training	Web training and testing (need to determine schedule and times)
TBD	ALL	Production Date	Tentative scheduled date that the system will be put into production

IVR project Overview

## **Project Resource Task Overview:**

Following is a Project Work Breakdown with roles and responsibilities for the project.

### **Phase 1: Project Kick Off:**

V4N will officially assign a Project Manager and schedule project work on a new custom development project once the V4N contract documentation (i.e., Formal Dealer Purchase Order) has been delivered and approved by V4N. Within 2 business days following receipt of the approved order, the assigned V4N Project Manager will contact the Dealer sales representative to acknowledge receipt of the project, identify key contacts, and review the necessary resources required for a successful implementation.

The V4N Project Manager will review the project specification and subsequently schedule a formal phone conference kickoff meeting with V4N, Dealer and Customer. The purpose of the kickoff meeting is to introduce project personnel resources and responsibilities, review the Functional Specification, discuss the deliverables, identify key customer project personnel, discuss the hardware installation and review a tentative timeline

The kickoff meeting should typically include key project personnel resources and roles, as follows:

**Dealer Sales Representative** - Primary Dealer contact to handle any new sales issues that may occur during the project implementation.

**Dealer Project Coordinator/Manager** - Primary Dealer contact for managing project implementation/on-site installation with Customer. This includes working with V4N Project Manager to assist in providing project updates and Customer deliverables, and coordinating local Dealer action items and resources required for implementation/installation of the V4N Solution.

**V4N Sales Representative** - Primary V4N contact working with Dealer Sales Representative to handle any new sales issues or change requests during project implementation.

**V4N Sales Engineer** - Primary V4N Technical Sales contact that assisted with the pre-sales technical design and requirements for the project. V4N SE provides continuity and ensures smooth transition from the pre-sales to post-sale implementation with V4N Engineering.

**V4N Project Manager** - Primary V4N contact responsible for coordination of all project activities and updates required for implementation of the V4N Solution.

**Customer Project Lead** - Primary Customer contact responsible for Customer deliverables and resources required for implementation/installation of the V4N Solution.

**Important Note:** Prior to the scheduling of a Project Kickoff Call, the Project Plan will be reviewed by the Dealer and the Customer and returned to V4N with appropriate pages initialed and the last page of the Project Plan completed and signed. Upon receipt of the Project Plan, V4N will schedule the kickoff call.

IVR project Overview

**Kick Off Agenda**

<b>Task ID</b>	<b>Task</b>	<b>Resource</b>
1. KO	Client Kickoff Meeting	V4N Project Manager
2. KO	Review Deliverables	V4N Project Manager
3. KO	Review Hardware Setup & Installation Requirements	V4N Project Manager
4. KO	Schedule the Hardware Installation	V4N Project Manager
5. KO	Circulate Project Resource Contact Sheet	V4N Project Manager
6. KO	Assignment of Dealer Project Coordinator/Installation Technician	Dealer Project Manager
7. KO	Provide Setup & Specification Documents	V4N Project Manager
8. KO	Review Project Steps & Tentative Timeline	V4N Project Manager



## Phase 2: Physical Installation

### Installation Requirements and Checklist:

The installation of Voice4net hardware involves not only the physical installation of the hardware, but also connectivity testing involving Voice4net remote support. In order to efficiently utilize customer, dealer and Voice4net resources, the installation of any hardware **must** be scheduled before installation begins. Prior to scheduling a validation call, the dealer/customer will receive an installation questionnaire that must be completed and returned to Voice4net. Once the questionnaire has been received by Voice4net, the validation will be scheduled based on available dates determined by the customer/dealer. Validations may not be scheduled until the questionnaire is completed and returned. A specific time will also be determined for the Voice4net support call, and a meeting invitation will be sent to the customer project manager, the dealer project manager and the installation technician. All contact information for the install needs to be provided to the Voice4net project coordinator in order to send meeting invitations to the appropriate people.

The V4N Project Manager will coordinate delivery and installation of the V4N Solution with the Dealer and Customer project leads. V4N will provide a Pre-Installation Checklist that must be completed, signed and returned to the V4N Project Manager prior to delivery and installation of the V4N Solution. The Dealer and Customer are responsible for preparing the proper environment for installation (e.g., Switch, cabling, T1's, assigned agent hunt groups, agent desktop application requirements, etc.). Once these requirements are met, V4N will schedule either remote or on-site installation assistance with the Dealer and Customer. V4N will provide installation support until the V4N Solution is functioning in accordance with the Functional Specification. The project will conclude with Dealer and Customer acceptance testing and project signoff. A minimum of 48 hours' notice is required for scheduling installation resources.

Delivery of hardware and software licenses generally occurs within 7-10 business days of the receipt of the formal PO. The initial hardware installation process generally takes 2-4 hours. The platform will be installed, pre-configured and shipped by V4N to the Customer-designated location. The Customer is responsible for insuring that the hardware and other systems necessary for installation of the solution will be in place prior to the actual installation, including getting the equipment set up, connected to power, the PBX or telephone lines, and the local area network. The Customer is responsible for the on-site installation and configuration of the equipment and cabling. Unless otherwise noted, V4N engineers will remotely train the End-Customer in the system administration, usage functions and general operation of the system. Additional information as to Dealer partner responsibilities associated with a V4N custom solution can be found in the "Dealer Responsibilities" document, available upon request.

IVR project Overview

**Installation Task List**

<b>Task ID</b>	<b>Task</b>	<b>Resource</b>
1. HW	Build, Stage & Test Production Hardware	(see Resource Section)
2. HW	Confirmation of Application/Hardware Shipment	V4N Project Manager
3. HW	Application and Site Implementation Confirmation	V4N Project Manager
4. HW	On-site/Remote Hardware Installation	Dealer Installation Technician
5. HW	Hardware Pre-Production Test	Dealer Project Manager (w/V4N)
6. HW	Pre-Installation Hardware Environment Checklist Review	Dealer Project Manager
7. HW	Schedule Hardware Installation with V4N & Customer	Dealer Project Manager
8. HW	Confirm Hardware Environment Installation Items	Dealer Project Manager
9. HW	Complete Hardware Checklist & Return to V4 Project Manager	Dealer Project Manager / Dealer Installation Technician
10. HW	Stations, Hunt Groups and Other PBX Configuration Requirements	Dealer Installation Technician
11. HW	Confirm Remote Access to V4N Support	Dealer Installation Technician / V4N Support Tech
12. HW	Configure IVR to accept Test DID	V4N Support Tech

**IMPORTANT NOTE: for IVR projects a test DID number that is pointed to the IVR hunt group is required for remote testing of the applications. Failure to provide this function on a timely basis may negatively impact the timelines of the project.**

### Phase 3: Specification Design & Sign Off:

V4N will work with designated Customer personnel to fully define the system requirements. Customer is responsible for documenting those requirements in the Functional Specification(s) or SOW (Statement of Work). Customer must formally acknowledge acceptance of these documents and acknowledge that the solution description and specifications herein meet the business requirements, prior to the commencement of solution development by V4N. These documents are the basis for all coding, internal Quality Testing and User Acceptance testing and as such it is imperative that these documents properly reflect the Customer expectations for this application. Customer should make certain that it understands the content of these documents prior to providing their approval. Once approved, any changes to the requirements herein must be handled by a separate V4N Quotation and/or V4N Change Order, in order to be reflected and/or incorporated in the delivery of this solution. Any such changes may involve additional cost and/or extension of the project schedule.

**Important note: Customer must provide detailed technical documentation to V4N prior to any involvement by V4N engineering resources. V4N engineering resources have a limited amount of time to devote to conference calls, and will only be involved in such if issues cannot be resolved through message strings posted to the V4N project management portal. The primary method of communicating will be through the portal, especially engineering related issues.**

Task ID	Task	Resource
1. SP	Team Review of Functional Specification / Call Flow	V4N Lead Engineer (w/Customer)
2. SP	Customer Application Integration Requirements (i.e. CRM or DB)	V4N Lead Engineer (w/Customer)
3. SP	Final Script Approval	V4N Lead Engineer (w/Customer)
4. SP	Voice Prompt Recording, ASR, TTS Requirements	V4N Lead Engineer (w/Customer)
5. SP	Review Technical Specification (Development Version)	V4N Lead Engineer

### Phase 4: Application Development

V4N will commence development of the custom application upon ratification of the Specification Document by the customer. Generally no changes or updates will be made during development that stray from the specifications. However, commercially reasonable effort will be applied by both parties to prevent "scope creep" of new functions or changes to the document during programming. Minor changes or updates that does not impact the general logic or functions of the system and require very little effort (generally 15 minutes or less) on the developer will not be charged. Major changes to the specification will require a formal change order and the Change Order Procedures described later in this document will take effect.

Task ID	Task	Resource
1. AD	Coding of Application Call Flow	V4N Lead Engineer
2. AD	Coding of Database Integration & Customer Application	V4N Lead Engineer (w/Customer)
3. AD	Program Voice Prompt Recordings, ASR, TTS	V4N Lead Engineer (w/Customer)
4. AD	Application Unit Testing	V4N Lead Engineer
5. AD	Application and Software Unit Test (Development QA)	V4N Lead Engineer
6. AD	Application Documentation/Installation Manual	V4N Lead Engineer
7. AD	Coding of Application Call Flow	V4N Lead Engineer
8. AD	Coding of Database Integration & Customer Application	V4N Lead Engineer (w/Customer)

## Phase 5: Testing & Preproduction

Customer is expected to thoroughly test the V4N solution and to provide written documentation of any problems to the V4N Project Manager within five calendar days, unless otherwise noted upon Solution delivery. Customer will be responsible for planning and performing the acceptance testing, including re-testing after problem fixes are implemented by V4N.

The development phase includes general testing and design validation by the programmers. However, it is strongly encouraged and expected that the customer will be heavily involved in the preproduction testing of the application following this development and prior to production. This includes calling into the system and listening to all prompts and steps and ensuring that the application is following the specifications.

A test plan will be created that will display a checklist of the primary functions of the application and allow the customer to review those functions and create pass/fail notes during the testing. Also, the customer is responsible for stress testing the application under load to ensure that connected equipment and personnel outside the control of V4N are properly prepared for production.

Following is a list of the primary tasks involved in the testing phase.

<b>Task ID</b>	<b>Task</b>	<b>Resource</b>
1. QA	Test plan document	V4N Lead Engineer
2. QA	Application Production Test	V4N Project Manager (w/Customer)
3. QA	Client Training - Web based	V4N Project Manager (w/Customer)
4. QA	Review Backup Procedures	V4N Project Manager (w/Customer)

## Phase 6: Post Installation Deliverables

V4N recognizes that technical or operational issues with the application may occur. V4N, the Dealer Partner, and the Customer share responsibility in the resolution of such issues and all may be involved throughout the entire process. The Customer is responsible for the initial reporting and documenting of issues to V4N using the V4N Support Procedure (to be provided by the V4N Project Manager) with separate numbering and/or distinct identification of each issue, and for providing V4N with complete information that will enable full evaluation of the issues. This may require attempting to replicate the issue(s) using V4N, Dealer Partner and Customer resources. It may also require keeping copious notes on the exact steps followed in reproducing the problem.

All issues reported to V4N will be researched to determine if the issue is a defect (i.e., V4N Solution does not perform in accordance with the requirements outlined herein), or requires a modification to the original requirements. The determination of defect versus enhancement is at V4N's discretion. Application defects identified prior to Customer Acceptance will be resolved by V4N at no charge to the Customer. Solution defects identified after Customer Acceptance will be resolved by V4N at no charge to the Customer for a minimum of one year following Acceptance, and thereafter as long as the V4N Solution is covered under a valid V4N Maintenance and Support plan. The Customer may be required to review and approve documentation of problem(s) and resolution(s) before they are implemented. Modifications (enhancements) to the V4N application will be subject to the Change Order process. Enhancements shall go through the Change Order process after Customer Acceptance of the initial V4N application per the requirements outlined herein.

To acknowledge acceptance of the V4N application upon completion of Customer acceptance testing, the Customer will provide a signature acceptance on the V4N Project Acceptance Form. Acceptance must occur at the earliest of:

- Upon receipt, for V4N application which do not involve custom development or services.
- 10 calendar days from the V4N application installation date (as proposed by V4N), if no defects are identified during acceptance testing and documented to V4N, or
- 3 calendar days from the last update/upgrade implemented by V4N in response to Customer's testing feedback, if defects are identified during acceptance testing and documented to V4N; or
- The start of Customer production or pilot production use of the V4N application (except as may be otherwise agreed to in writing by the Director of V4N).

If Customer does not ratify the V4N Project Acceptance Form in accordance with the above acceptance schedule, Acceptance will occur by default. Note that delays in scheduling or completion of acceptance testing (which are not caused by V4N) shall not be permitted to extend the above time windows in which acceptance is required to occur.

Upon Acceptance, the term of the V4N Maintenance & Support Agreement shall begin, and technical support for the V4N application shall immediately transition from the V4N Engineering and Project Management organizations to the V4N Technical Support Group as outlined in the Technical Support procedures.

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**Post Installation Task List:**

<b>Task ID</b>	<b>Task</b>	<b>Resource</b>
1. PI	Provide Dealer Delivery & Acceptance (D&A) Agreement	V4N Project Manager
2. PI	Dealer/Customer Acceptance Signoff	Dealer Project Manager (w/Customer)
3. PI	Post Implementation Follow Up Survey	V4N Project Manager
4. PI	Post Implementation Support Requests	V4N Support Group (w/Customer)
5. PI	Provide Dealer Delivery & Acceptance (D&A) Agreement	V4N Project Manager

**Phase 7: Change Order Request Procedures**

The Change Order Process is the mechanism that allows the Customer to modify the requirements outlined in the SOW document. If Customer determines that a change is needed they must notify V4N in writing of the proposed change(s) and should include a complete description of the change needed.

V4N will research the feasibility of the requested change(s), fully define the requirements with the Customer and determine the impact to the cost and/or schedule. Then V4N will provide a document containing a detailed description of the changes requested, the costs, and the impact to the project schedule.

Customer should review the Change Order document, and determine if the requirement is defined properly and if the costs are acceptable. If so, Customer will note their approval by signing the form and returning it to V4N along with the proper order authorization/media (PO).

**Change Order Task List:**

<b>Task ID</b>	<b>Task</b>	<b>Resource</b>
1. CO	Submit Change Order Request	Customer, V4N Sales Engineer
2. CO	V4N Change Order Time/Cost Estimate	V4N Sales Rep / Dealer Sales Rep
3. CO	Change Order Project Schedule	V4N Project Manager
4. CO	Submit Change Order Request	Customer, V4N Sales Engineer

## Phase 8: Technical Support Procedures (Maintenance & Support, M&S)

Mitel, Voice4net and County acknowledge and agree that the parties' rights and obligations with respect to maintenance and support services, technical support procedures, and support start dates and manufacturer warranties will continue to be governed by the Contract between Travis County and Mitel for Interactive Voice Response System effective August 12, 2008.

### General System & Installation Requirements:

V4N systems come staged and ready for installation and testing of the specific applications outlined in the Project Plan. However, there are some items that are specifically not included in order to allow Customers to configure security and backup procedures that will fit within their respective environments. Failure to provide any of the required items on this list may lead to a delay of the project and additional costs not covered by the V4N Cost Proposal and Functional Specification for the project. Please direct any questions regarding the items in this document to: [support@voice4net.com](mailto:support@voice4net.com)

### Customer Provided Hardware or Virtual Machine Requirements

#### HARDWARE:

PROVIDED BY CUSTOMER (minimum configuration requirements listed below)

- Windows 2008 Server R2 Std. Edition (64-bit)
- MS SQL 2012 R2 Standard with SSRS installed
- Quad Core Xeon CPU w/ 8GB RAM
- 120GB HDD
- 100/1000 NIC

*Access to local machine admin will be required for software installation & support. Domain rights are optional and not required.*

**If the VM/HW is joined to the domain, the LOCAL machine Administrative Account must not be changed.**

## Explanation of Minimum Requirements

If the Customer installs just the minimum of both Windows 2008 R2 and SQL without any advanced features or reporting and without any Microsoft updates, it comes to about 25GB. Voice4net software requires ALL services packs and the advanced reporting features. Every client is different, so Voice4net cannot know exactly which features are needed until production time. This variable explains the need for the service packs and the reporting features.

Most Voice4net installations with Windows 2008 R2 and SQL 2012 R2 Standard or Express Advanced and ALL UPDATES and SERVICE PACKS, and Voice4net IVR Software, plus troubleshooting tools, etc., use a minimum of 60-80GB.

### Network and PBX Requirements:

- System must be connected to Ethernet network in the same subnet and/or VLAN as the phone system or carrier equipment being connected to the server.
- The server must have a Static IP address
- The server must have 'outbound' internet access and be able to navigate to <http://support.voice4net.com> for remote support and implementation procedures
- System must have a local machine administrator account accessible by V4 staff for support and implementation procedures.
- When connecting to a PBX specific guidelines must be met for configuration including
  - Port 5060 SIP UDP
  - RFC 3261- REFER (for transfer) defined in RFC 3515
  - RFC 2833- DTMF transport via RTP events
  - G.711u- Voice-band CODEC for transporting audio (uLaw and ALaw variants)
  - Program DID to ring pilot number/ARS digits
  - **DID must be reachable from outside network (i.e. actual 10-digit phone number).**

### Antivirus Requirements:

Customer shall determine the method of antivirus protection (if any) as required, for all components of the proposed solution.

Options include:

- 1) The V4N endorsed configuration for Microsoft antivirus
- 2) Other antivirus software, which may require additional testing and validation fees by V4N and may cause performance issues with the applications that are not covered under warranty or support.

### Backup Requirements:

Customer shall determine and be responsible for Customer backup requirements for all components of the proposed solution and are subject to the following considerations:

- 1) Ensure backups are scheduled for non-peak hours to minimize impact to real-time applications
- 2) Ensure Customer use of any backup software that compresses the hard disk, which may affect real-time performance of the custom application, is minimized and/or thoroughly tested with the V4N custom solution prior to live deployment. If such disk compression software is discovered on a system



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having a performance problem, the V4N maintenance coverage of the system may be affected and will not be covered.

In order to properly backup V4 processes the following software is required:

Enterprise Level SQL Backup Agent (SQL Client)

Install SQL Client and set up the Client capture the SQL directory and as well as the contents of the following directory: **C:\program files(x86)\Voice4net\**

**The frequency of the backup is the decision of the Customer. Daily backups should be considered a minimum, and the preferred method would be real time backups. This would be dependent on the Customer abilities.**

**Other Resources That May Be Required for Supporting Installation of V4N Solutions:**

Additional Dealer Partner or Customer personnel resources typically required to successfully deploy a V4N custom solution include:

- Network Administrator
- Switch Technician
- Onsite System Installation Technician
- Database Administrator
- Voice Recording talent (V4N does not supply the application-specific voice prompts)
  - Professional Voice Services are available at <https://voice4net.partnervoices.com>
- 3rd party vendor for integration to desktop applications or 3rd party backend databases (as required)
  - NOTE: delays or issues caused by 3<sup>rd</sup> party providers may negatively impact the production timelines and are not covered under warranty of the system.
- Dealer Partner project manager is highly recommended

**Environment Requirements:**

For solutions requiring a server (V4N-provided or customer-provided), the Dealer Partner or Customer shall supply the following:

- At least one dedicated, isolated 110V electrical circuit on a 15 Amp circuit breaker with isolated neutral and ground to be located within 7 feet of the main telephone equipment.
- V4N recommends battery backup as well as dedicated isolated power.
- Equipment room should be 50-78 degrees Fahrenheit 24 hours a day, 7 days a week
- The V4N server must have a network connection to Customer Ethernet TCP/IP data network, for Customer configuration and reporting tools as required. This may include usage of Internet Explorer 7.0 or greater and a remote control software package (Bomgar) at the System Administrator desktop.

**NOTE: failure to provide the proper environment for application equipment will void warranty and support for the provided hardware and performance cannot be guaranteed.**

**Customer Responsibilities for V4N Hardware**

- Upon receipt of V4N hardware, the Customer assumes responsibility for the safe handling and storage of all V4N hardware until it is installed and validated by V4N
- Customer will retain all packing materials for at least 3 months from date of receipt of hardware to insure proper packing of hardware if a return of hardware to V4N becomes necessary for warranty work

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**Terms of Service Agreement Acknowledgement**

The Terms of Service between Voice4net, The Customer, and Dealer (as defined on pg. 3 of the project plan and in the acknowledgement below) will be in effect on date indicated below.

The Customer, in providing the required information in this acknowledgement indicates the receipt of, and agreement to the terms defined in the project plan.

The Customer also acknowledges that deviations from the project plan will require Change Order procedures and will result in delays and/or increased cost in project implementation.

CUSTOMER NAME

CUSTOMER AUTH REPRESENTATIVE (print)

ADDRESS 1

TITLE

ADDRESS 2

SIGNATURE

CITY/STATE/ZIP

DATE

CUSTOMER PRIMARY PHONE NO.

DEALER NAME

DEALER AUTH REPRESENTATIVE (print)

ADDRESS 1

TITLE

ADDRESS 2

SIGNATURE

CITY/STATE/ZIP

DATE

DEALER PRIMARY PHONE NO.