ITEC
Image Technologies

docuTRAK's Cloud Standard Implementation

Date: September 10, 2020

Version: 1.0

1. Introduction

This document includes a description for the implementation of docuTRAK's Cloud which including: Proposed Scope of Work, Assumptions and docuTRAK's Training.

Proposed Scope of Work is Standard Scope. Other options for implementation will be at extra charge.

2. Proposed Scope of Work

1. Implementation and configuration of **docuTRAK organization structure** to support docuTRAK users including:

   - **docuTRAK Internal users (Records Registration, Broadcast & Workflow)**
   - **docuTRAK External users**

2. Implementing and configuration of **docuTRAK Modules** including:

   a. **One (1) central records registration for incoming records**

   Incoming records registration, archiving the correspondence document and generating a unique registration reference number.

   o Name: Incoming Record

   o Registration Reference No. format: **Incremental Number/ Year/ IN.**

   o **The registration number will be reset yearly**.

   o Index data that will be stored with the record will include:

     ▪ Subject
     ▪ Date
     ▪ From
     ▪ External Ref No
     ▪ Year
     ▪ Sign By
     ▪ Received Dept.
     ▪ Received Date
     ▪ Status
     ▪ Comments

b. **One (1) central records registration for outgoing records**

Outgoing records registration, archiving the correspondence document and generating a unique registration reference number.

- o Name: Outgoing Record
- o Registration Reference No. format: **Incremental Number/ Year/ OUT.**
- o **The registration number will be reset yearly**.
- o Index data that will be stored with the record will include:
  - Source
  - Date
  - Year
  - Subject
  - To
  - Status
  - Related Incoming Ref
  - Comments

c. **One (1) document ad-hoc workflow for Internal Memos**

Ad-hoc workflow functionalities, tracking the documents bath with secure history logging and reporting. Each workflow case will have its unique registration reference number.

- o Name: Internal Memos
- o Registration Reference No. format: **Incremental Number/ Year/ WF.**
- o **The registration number will be reset yearly**.
- o Index data that will be stored with the workflow case will include:
  - Source
  - To
  - Date
  - Related Incoming Ref
  - Related Outgoing Ref
  - Status
  - Document Type
  - Comments

d. **Implementation and configuration of docuTRAK E-Services including One E-Service Workflow for external records registration**

External records will be submitted by external docuTRAK users via the e-Services portal. Then the external record will be transferred to a predefined docuTRAK user as a workflow case. The request will go through the usual workflow life cycle. The external users will be able to check the record status & review the reply in the portal.

o Name: External Records Registration
o Registration Reference No. format: **Incremental Number/Year/EXT.**
o **The registration number will be reset yearly**.
o Predefined User: Records Registration
o Index data that will stored with the external record will include:
  ▪ Subject
  ▪ Date
  ▪ From
  ▪ External Ref No
  ▪ Received Dept.
  ▪ Status
  ▪ Required action.

e. **Implementation and configuration docuTRAK mobile for internal & external users including Electronic Signature module for the licensed "Signing Users".**

f. Configuration of users' access rights including:
  o Administrator
  o Department level reports
  o Organization level repots
  o Correspondence rights
    ▪ Register records
    ▪ Full search
  o Workflow Rights
    ▪ Initiate cases
    ▪ Assign cases
    ▪ Consult cases
    ▪ Close cases
    ▪ Send to committee

- Full search
- Override OS
- Tracking
  - o Broadcast Rights
    - Initiate broadcast
    - Monitor

3. Assumptions

1. Configurations will be in both languages' Arabic and English.
2. ITEC assumes readiness of organization structure document prior to the project kick off, to be provided by the customer in the form of Excel Sheet containing the following information in both Arabic and English:
   a. Users' names
   b. Users' ID Numbers
   c. Related Sector Name
   d. Related Department Name
   e. Related Job function / position
   f. Employee Head (Head node for each employee)
   g. Employee Head ID Number
   h. Users' access rights
   i. Modules the user will be assigned to.
3. The proposed scope of implementation is the Standard Scope. Other options for implementation will be at extra charge. We have listed some examples of Custom Implementations in Section-5.

4. docuTRAK Training

1. **End Users- Train the Trainer Training**
   (1 session for 0.5 day each; up to 8 Trainees*)
   These training sessions will target trainers as they will be responsible for conveying know-how and skills to end users of the proposed correspondence management application. Audience of this training will get familiar with:
   - o Architecture of the correspondence Management solution
   - o User interfaces for the correspondence Management solution
   - o Frequently asked user questions
   - o Procedures of help-desk communication

2. **Records Management (Correspondence Registration) Users Training
   (1 session for 0.5 day; up to 4 Trainees)**
   This training will target the "End Users" who will be responsible for Correspondence Registration. It will cover main features for docuTRAK's RECORDS and Workflow/routing functions.

3. **Administration Training Session
   (1 session for 1 day; up to 2 Administrators*)**
   This training targets System Administrators who will carry out the day-to-day administration & Support activities for the Correspondence Management solution. Objective of this training is to enable System Administrators:
   o Manage organization chart structures for the correspondence management solution
   o Understand the configurations and customizations made
   o Plan and execute system backups and restore
   o Monitor performance for the Solution
   o Generate high level and low-level reports for the Solution

   * Each day is equivalent to 6 hours of Online intensive training.

5. Custom Implementation Examples

The custom implementations scope can provide extra internal workflows, external workflows, and custom fields to meet your specified business needs.
As an example, we have listed the following suggested custom implementations:

a. **One (1) document ad-hoc workflow for Purchase Request**
   Ad-hoc workflow functionalities for the purchase request process, tracking the documents bath with secure history logging and reporting. Each workflow case will have its unique registration reference number.
   o Name: Purchase Request
   o Registration Reference No. format: **Incremental Number/ Year/ PR.**
   o **The registration number will be reset yearly**.
   o Index data that will be stored with the workflow case will include:
   ▪ Requester
   ▪ Date
   ▪ Subject
   ▪ Type

- Status
- Comments

b. **One (1) document ad-hoc workflow for Vacation Request**

Ad-hoc workflow functionalities for vacation request process, tracking the documents bath with secure history logging and reporting. Each workflow case will have its unique registration reference number.

- o Name: Vacation Request
- o Registration Reference No. format: **Incremental Number/ Year/ VR.**
- o **The registration number will be reset yearly**.
- o Index data that will be stored with the workflow case will include:
  - Requester
  - Date
  - Subject
  - Type
  - Reason
  - Status
  - Comments

c. **One (1) document ad-hoc workflow for Leave Request**

Ad-hoc workflow functionalities for leave request process, tracking the documents bath with secure history logging and reporting. Each workflow case will have its unique registration reference number.

- o Name: Leave Request
- o Registration Reference No. format: **Incremental Number/ Year/ LR.**
- o **The registration number will be reset yearly**.
- o Index data that will be stored with the workflow case will include:
  - Requester
  - Date
  - Subject
  - Type
  - Reason
  - Status
  - Comments

d. **Implementation and configuration of docuTRAK e-services including one e-service external workflow for Quotation Request**

Quotation requests will be submitted by external docuTRAK users via the e-Services portal. Then the request will be transferred to a predefined docuTRAK user as a workflow case. The request will go through the usual workflow life cycle. The external users will be able to check the record status & review the reply in the portal.

   o Name: Quotation Request
   o Registration Reference No. format: **Incremental Number/Year/QR.**
   o **The registration number will be reset yearly**.
   o Predefined User: Sales Manager
   o Index data that will stored with the external record will include:
     ▪ Subject
     ▪ Date
     ▪ From
     ▪ Type
     ▪ Status
     ▪ Required action.

e. **Implementation and configuration of docuTRAK e-services including one e-service external workflow for Service Complaint**

Service complaints will be submitted by external docuTRAK users via the e-Services portal. Then the request will be transferred to a predefined docuTRAK user as a workflow case. The request will go through the usual workflow life cycle. The external users will be able to check the record status & review the reply in the portal.

   o Name: Service Complaint
   o Registration Reference No. format: **Incremental Number/Year/QR.**
   o **The registration number will be reset yearly**.
   o Predefined User: Operations Manager
   o Index data that will stored with the external record will include:
     ▪ Subject
     ▪ Date
     ▪ From
     ▪ Product/ Service
     ▪ Status
     ▪ Required action.

f. **Implementation and configuration of docuTRAK e-services including one e-service external workflow for Job Application**
Job applications will be submitted by external docuTRAK users via the e-Services portal. Then the application will be transferred to a predefined docuTRAK user as a workflow case. The request will go through the usual workflow life cycle. The external users will be able to check the record status & review the reply in the portal.

o Name: Job Application
o Registration Reference No. format: **Incremental Number/Year/SC.**
o **The registration number will be reset yearly**.
o Predefined User: HR Manager
o Index data that will stored with the external record will include:
  ▪ Date
  ▪ English Name
  ▪ Arabic Name
  ▪ Subject
  ▪ Qualification
  ▪ Experience years
  ▪ Status