

Data Services Specifications

Use this form to request data cleanup, data migration, or importing/exporting data from the Caselle Data Services team. This document must be signed and returned before the Caselle's Data Services department will begin work on this project.

Site: Bethel AK

Name of Job: BT Copy/Updates/Training

Version: 1.01

Project #: 503758

Date Created: 11/6/2017

Date Updated: 11/6/2017

Part 1: Project Information

Client Contact: Patty Burley

Phone: 907-543-1385

Email: pburley@cityofbethel.net

Caselle Contact: Andrew Richards

Phone: 801-850-5089

Email: apr@caselle.com

Part 2: Overview/Purpose

Description of Purpose:

Bethel would like Caselle to make a historical copy of its business license/tax database, purge out prior tax returns, update tax return line items, and provide additional training/review of how business tax processes should be run in Caselle. See appendix for cost breakdown.

Caselle's Project Obligations:

Caselle will do the work as outlined above. The updates to the database will be done through a SQL script run at Caselle. Bethel's live BL0 database will be pulled on January 3, 2018 for the script to be run. Once the updates have been run at Caselle, live data will be sent back to Bethel and follow-up training/reviews will be done. Caselle will set up a historical directory (CSLDATA_history) for the retired version of the BL0 database. This will mean an additional icon to access this data, which will contain the old tax rates, return types, returns, transactions, etc.

Part 3: Client Responsibilities

Client's Project Obligations:

Bethel will be required to review the BL0 changes with Caselle prior to running the script on Jan 3 2018. Bethel will also be required to send the live data to Caselle, as well as to provide admin access to its server during the installation of the updated data and creation of the new historical directory. Once live training/review has been completed, Bethel will need to send written confirmation to Caselle that the project is complete to its satisfaction.

Part 5: Revision History/Change Control

Revision History	Date	Version	Revision Description	Comments/Change to estimate	Author
1	11/6/2017	1.01	Initial Draft	--	APR
2					
3					
4					
5					

Part 6: Custom Specification Sign-off

Sign Off:

I have read and understand the details of this document. By signing below, I understand and agree I am responsible to complete all items detailed under the client responsibilities section of this document, and agree that Caselle is only required to complete the items detailed under the Caselle Responsibilities section of this document.

Initials

APR

The agreed upon hours for this project is 12 hours. I understand that the Time & Materials rate for this project is \$145.00 an hour and agree to the project warranty.

APR

Warranty Period and Explanation:

The warranty period of the project detailed in this document is thirty calendar (30) days from the date of initial deployment (for Post-Live customers).

APR

Terms of the Warranty Include:

If a defect is found within the 30 day warranty, that defect will be corrected at no cost to the customer if no approved project hours remain. A defect is logged when the defect is submitted in writing to the primary Caselle contact listed on this document.

APR

If any defect is found **after** the warranty period, the defect will be corrected on a Time & Material basis at the customer's agreed upon contract rate. The customer must contact the assigned technical consultant to record the defect that is found.

APR

If a revision is needed after the warranty period that is **not contained in this specification**, the additional item(s) will be estimated and submitted for client approval. Any further additions will be billed on a Time & Material basis at the customer's agreed upon contract rate. In this scenario the customer must either contact their primary Caselle contact listed above, or submit a new request through <http://services.caselle.com/data>

APR

This revision of this document is valid for and must be approved within ninety (90) days from the date of issue.

*Please note that any modification to this specification by the client (hand written or electronic) will invalidate it.

APR

Post Warranty Procedures & Maintenance Fees

Any issues that require the engagement of Consulting Services resources reported after the warranty period has expired will be billed at the Customer's published contract rate on a Time & Materials basis. Alternatively, the customer may purchase a Pre-Paid Maintenance Plan to potentially cover some of these costs. Please contact Caselle for further information.

Part 7: Authorization

Specification Agreed to and Authorized by:

Specification Version: 1.01

Site: Bethel AK

Name: Peter A Williams

Title: City Manager

Signature: Peter A Williams

Date: 11/7/17

Appendix

COST BREAKDOWN	Hours
Data Load/Send/Assessment/etc.	6
Data Deletion	2
Tax Return Updates	2
Training	2
TOTAL	12