



City of Columbus

OnBase HR Claims Management Solution
Dayforce Employee Data Export
Remaining Project Tasks

SUBMITTED BY:

3SG PLUS

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State Term Schedule (STS): 534577 (Expiry 6/30/2021)



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Statement of Work: Dayforce Employee Data Export

This document is comprised of the original Scope of Work for the City of Columbus Human Resources (“HR”) OnBase Claims Management Solution as well as the estimated effort necessary to address the City’s change from PAP970 to Ceridian Dayforce as the system from which employee data records shall be exported.

Original Scope of Work

The following is taken from directly from the Solution Proposal (09/19/2018) and the Solution Summary (09/18/2019) for the HR OnBase Claims Management Solution:

Day Forward Claims Document Management Overview (per Solution Proposal)

- Employee related data is stored in PAP 970, which is an electronic payroll report stored in a network drive (X:\). This report is updated at the end of every pay period on a set schedule. 3SG Plus assumes the format of the PAP file will not change.
- This information will be updated on a scheduled basis in OnBase and is used to auto populate the index values during the indexing process.
- If information changes in PAP 970, client will have to confirm if they require the updates to be reflected only on day forward documents or ALL documents in OnBase.
- No employee record shall ever be deleted from OnBase even if the employee has been terminated their employment with the city and has that update in PAP 970 report.

AutoFill Keyword Set Import – PAP970 (per Solution Summary)

- AutoFill Keyword Sets are used to assist users when indexing or retrieving documents. An AutoFill Keyword Set instance consists of a primary keyword value and corresponding secondary keyword values on a document.
- Data from the City’s payroll system (PAP970) shall be available to users in the Incident and Claims Management solution. A file of payroll data shall be exported from PA970 and shall subsequently be imported into the solution. As records are updated in PAP970, incremental imports can be scheduled to ensure the solution is utilizing the most recent employee information.
- Once configured, AutoFill Keyword Sets cannot be modified. Keywords may be added to an existing AutoFill Keyword Set, but the field order may not be modified, nor can keywords be removed from an existing AutoFill Keyword Set.



Original Employee Data File Specification

The following file specification reflects the current OnBase HR Claims Management Employee Data Autofill Keyword Set (AFKS) configuration, which is in DEV, STAGE and PRODUCTION:

Field Order	OnBase Keyword Type	Data Type	Max Length	Example
1	Employee ID	Alphanumeric	25	<i>Primary ID, unique</i>
2	Employee First Name	Alphanumeric	40	JOHN
3	Employee Last Name	Alphanumeric	40	SMITH
4	Employee Middle Initial	Alphanumeric	1	R
5	Employee SSN	Alphanumeric (Masked)	12	123-45-6789
6	Employee Date of Birth	Date	n/a	12/04/1971
7	Employee Address	Alphanumeric	100	1234 SESAME ST.
8	Employee Hire Date	Date	n/a	12/17/2007
9	Employee Bargaining Unit	Alphanumeric	40	FOP
10	Employee Job Classification Code	Numeric	9	3064
11	Employee Job Classification Description	Alphanumeric	30	POLICE OFFICER
12	Employment Type	Alphanumeric	10	FTR
13	Employee Department Name	Alphanumeric	40	PUBLIC SAFETY
14	Employee Division Name	Alphanumeric	40	POLICE
15	Employee Dept./Div. Code	Alphanumeric	10	3003
16	Employee City	Alphanumeric	40	COLUMBUS
17	Employee State	Alphanumeric	25	OHIO
18	Employee Zip	Numeric	9	43215

Problem Statement

The existing OnBase Claims Management Solution, which was developed in the City's DEV environment, tested by HR business users in the STAGE environment, and is now in PRODUCTION, utilizes a Keyword Type of **Job Classification Code** which is a numeric format, not to exceed nine (9) characters. This Keyword is assigned to Document Types and Claims in all three environments, and has current live data indexed in the Production environment.

Dayforce now includes the union name in addition to the previous expectation of a four (4) digit numeric value for Job Classification Code. The new alphanumeric value output is being rejected by OnBase. The Keyword Type as it is currently configured expects numeric values only.



NEW Employee Data File Specification

The City of Columbus shall provide a complete file of employee data records in the following field order, assuming the format and character limitations indicated.

Order ID	OnBase Keyword Type	Format	Character Limit	Example
1	Employee ID	Alphanumeric	25	<i>Primary ID, unique record identifier</i>
2	Employee First Name	Alphanumeric	40	JOHN
3	Employee Last Name	Alphanumeric	40	SMITH
4	Employee Middle Initial	Alphanumeric	1	R
5	Employee SSN	Alphanumeric (masked)	12	321-XX-XXXX
6	Employee Date of Birth	Date	n/a	12/04/1971
7	Employee Address	Alphanumeric	100	1234 SESAME ST.
8	Employee Hire Date	Date	n/a	12/17/2007
	Employee Bargaining Unit	Alphanumeric	40	FOP
9	Employee Job Classification Code (NEW)	Alphanumeric	30	AFSMCE 2191
10	Employee Job Classification Description	Alphanumeric	30	POLICE OFFICER
11	Employment Type	Alphanumeric	10	FTR
12	Employee Department Name	Alphanumeric	40	PUBLIC SAFETY
13	Employee Division Name	Alphanumeric	40	POLICE
14	Employee Dept./Div. Code	Alphanumeric	10	30/03
15	Employee City	Alphanumeric	40	COLUMBUS
16	Employee State	Alphanumeric	25	OHIO
17	Employee Zip	Numeric	9	43215

- The City of Columbus shall place an initial complete file in the following directory:
<\\qw3sqlmega4vm\OnBase>
- 3SG Plus shall configure an automated scheduled process to import incremental files
- The City of Columbus shall deliver incremental delta files on a bi-weekly basis, according to scheduled pay periods
 - Incremental delta files shall contain new employee records created in Dayforce after the previous export was delivered
 - Incremental delta files shall be placed in the following directory according to the bi-weekly schedule set forth with 3SG Plus:
<\\qw3sqlmega4vm\OnBase>
 - Incremental delta files shall consistently reflect the field order and data formats according to this specification



3SG Plus Deliverables

The following configuration effort shall be completed in the City of Columbus OnBase STAGE and PRODUCTION environments:

- Create new Keyword Type: Employee Job Classification Code (NEW): Alphanumeric (30)
- Add/assign new Keyword Type to all HR Claims Management Document Types
- Create new Employee Data AFKS, according to specification in this document
- Assign new AFKS to all HR Claims Management Document Types and WorkView configuration
- Remove original/previous Employee Data AFKS from all HR Claims Management Document Types and WorkView configuration
- Hide original/previous Keyword Type: Employee Job Classification Code: Numeric (9)
- Hide original/previous Keyword Type: Employee Bargaining Unit: Alphanumeric (40)
- Create new Employee Data AutoFill Import Processor
- Create an automated scheduled import process – bi-weekly according to the City’s pay periods
- Re-Index all Claims and HR Claims Management Document Types with updated (new) Employee Data AFKS (PRODUCTION ONLY)

Assumptions, Dependencies & Exclusions

- This is a Proposal for Professional Services only. It does not include any new software
- This document does not contain complete solution configuration details. The OnBase Keyword Types referenced in this document are only those related to the Employee Data AutoFill Keyword Set.
- Any future data discrepancies identified that require configuration updates to the existing OnBase HR Claims Management Solution are outside of the scope of this effort. If necessary, after execution, this Services Proposal or corresponding agreement may be adjusted in scope, or a new agreement issued, following the Project Change Control Process
- If employee data records are not placed in the directory indicated, employee data shall not be updated in OnBase – [\\qw3sqlmega4vm\OnBase](#)
- Any change to field order or data format in the employee data records placed for OnBase import shall result in an import failure, and employee data shall not be updated in OnBase
- Re-Indexing of existing Claims and HR Claims Management Solution Documents shall take place in Production environment only

Change Request

Requested changes to this Services Proposal shall be managed using the Project Change Control Process:

1. If any party believes that a change to this Services Proposal is warranted, the party shall issue a Change Request in writing. The 3SG Plus and the City of Columbus project teams will review the Change Request, determine the impact, and agree to the change(s). Once the change(s) are agreed upon, 3SG Plus will provide a formal Change Order to Customer outlining the change in Professional Services, the impact on hours, resources, timeline and/or cost.



2. 3SG Plus and the City of Columbus will fully execute the Change Order prior to the requested changes taking effect. The City of Columbus and 3SG Plus acknowledge that this may affect Professional Services, timeline and deliverables, and therefore will make reasonable efforts to execute any changes to this Services Proposal with enough lead-time to minimize the influence on the project.
3. If the parties cannot agree upon the need or content for any Change Order, the revised or additional Professional Services shall not be performed.



Statement of Work: Remaining Project Tasks

This document is comprised of the scope of remaining effort required to complete the implementation of the City of Columbus Human Resources (“HR”) OnBase Claims Management Solution, as of 5/1/2021.

3SG Plus Project Work 5/1/21 – 5/31/21

The following Professional Services were provided during the month of May 2021, supporting the Go-Live of the HR Claims Management Solution:

- Weekly project team checkpoints
- Production issue evaluation, review, and resolution
- Production update meetings for 3SG Plus and Department of Technology resource to review and implement updates to resolve issues in Production environment

3SG Plus Remaining Project Tasks

The following items are outstanding project tasks required to complete the HR OnBase Claims Management Solution implementation:

- Project team checkpoints and communication with HR business regarding PROD Solution Validation
- Continued HR business user support for Go-Live (Production Solution Validation)
- Initiate Hyland Scheduled Processes Windows Service for Xmedius Fax Import
- Support HR business users with the indexing and validation of incoming documents once Fax Import Process is live

Please Note: *The remaining project tasks are dependent upon the initiation and execution of deliverables in the Proposal for Dayforce Employee Data Export (delivered 5/12/2021).*

Assumptions, Dependencies & Exclusions

- The 3SG Plus Remaining Project Tasks outlined above shall not be performed until the initiation and execution of deliverables in the outstanding Proposal for Dayforce Employee Data Export, as the updated employee data is required in order to index the awaiting Xmedius faxed documents
- The City of Columbus (HR and/or DoT) shall be responsible for the indexing and index validation of incoming Xmedius fax documents once imported
 - 3SG Plus shall not perform 100% of indexing and index validation for incoming Xmedius Fax documents, but rather support the City of Columbus (HR and/or DoT) users
- Any future data discrepancies identified that require configuration updates to the existing OnBase HR Claims Management Solution are outside of the scope of this effort. If necessary, after execution, this Services Proposal or corresponding agreement may be adjusted in scope, or a new agreement issued, following the Project Change Control Process
- All remaining project effort shall take place in the Production environment only
- This is a Proposal for Professional Services only. It does not include any new software.



Pricing

3SG Plus is pleased to offer the City of Columbus the following rates in an effort to provide the best solution available while maintaining a cost-conscious approach. Professional Services Pricing shall cover the two (2) Statements of Work in this Proposal: Dayforce Employee Data Export and Remaining Project Tasks.

Professional Services Pricing – State Term Schedule #534577 (3SG Plus, LLC.)

Resource Type	STS Rate	Hours	Cost
Project Management	\$146.29	8	\$1,170.32
Solution Engineering	\$188.85	88	\$16,618.80
Total Professional Services Cost			\$17,789.12

Pricing Terms

1. 3SG Plus shall invoice the City of Columbus for actual resources used and hours incurred on a monthly basis
2. Invoices shall be due and payable to 3SG Plus within thirty (30) days of invoice date
3. Project invoices shall delineate the services provided, including the applicable service period, resources used, time incurred and pricing corresponding this Proposal



Document Acceptance – Solution Proposal

Customer acknowledges that they have read and agree to the proposal as documented. Acceptance of this proposal is an agreement to pay the services as estimated and detailed above. In addition to approval signature, please also provide billing contact information and note 3SG has an environmentally friendly paperless back-office, requiring email invoice delivery.

Billing Email (Required):

Billing Contact Name:

Billing Address:

Billing Phone Number:

CITY OF COLUMBUS APPROVAL:

Approver/Title	Signature	Date Signed
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3SG PLUS APPROVAL:

Brian Olah, President & CEO		4/16/20-21
Approver/Title	Signature	Date Signed

