



CITY OF JACKSON
DEPARTMENT OF PLANNING & DEVELOPMENT

RFP for

**Permitting, Licensing, and Enforcement Software and
Implementation Services**

Submitted by

TruePoint Solutions

In partnership with

Infor Public Sector

***Submittal Date
February 5, 2019***

1. Letter of Transmittal

February 5, 2019

Jordan Rae Hillman, Deputy Director of City Planning
Department of Planning and Development
City Clerk's Office of Jackson—RFP
219 South President Street 1st Floor
Jackson MS 39201

RE: RFP for Permitting, Licensing, Enforcement Software & Implementation

Dear Ms. Hillman and Evaluation Committee:


TruePoint Solutions – in partnership with Infor Public Sector – is pleased to offer our response to the City of Jackson's RFP for Permitting, Licensing, and Enforcement Software and Implementation Services. In the pages that follow, we will demonstrate TruePoint's extensive history, understanding, and capability with the Infor suite of products and its implementation at agencies much like yours.

In observance of the City's requirements for Transmittal Letters, we offer the following information:

Name of the firm	TruePoint Solutions, LLC
Person(s) submitting the proposal	Kent Johnson
Main office address	3262 Penryn Rd., Suite 100-B Loomis, CA 95650
Primary contact person's name	Kent Johnson
Title	Chief Executive Officer
Telephone number	916-259-1293
Email	kjohnson@truepointsolutions.com

We would like to take this time to thank you for your consideration in allowing us to demonstrate TruePoint's successful strategy to implement a business critical solution for the City. We look forward to working with you and to the prospect of building a long-term relationship.

Regards,


Kent Johnson
TruePoint Solutions
(916) 259-1293 office
(916) 607-4490 mobile
(916) 256-1975 fax

COMPANY OVERVIEW

- TruePoint Solutions

Incorporated:

- 2004
- 51 employees

Professional Services:

- Business Analysis
- Configuration
- Data Conversion
- Report Development
- Event Scripting
- Interface Development
- Consulting
- Training

Industry:

- State and Local Government

Industry Focus:

- Land Management and Permitting
- Business and Trade Licensing
- Code Enforcement
- Asset Management
- Electronic Document Review
- Utility Billing
- IT Consulting

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2. Executive Summary

A summary of the proposal stating the proposer's understanding of the requested system and highlights of the proposed solution.

The City of Jackson ("City") desires a solution to its permitting, licensing, inspections, land use, and code enforcement needs. TruePoint Solutions has the proven skill set to successfully provide the project approach and deliverables the City seeks – an approach which includes Project Management, Discovery, Design, Development, Training and User Manuals, User Acceptance Test (UAT), Implementation and Acceptance, Post-Implementation Support. With our tenured experience on the Infor Public Sector (IPS) platform, we are confident that this project can be a successful endeavor for all involved.

Our goal is to provide a mentoring approach and strategy as we implement and configure software to meet the business and operational needs of the City.

Our company brings years of experience to an implementation of this nature. Not only do we understand how projects should be implemented but also, what more importantly should not be done. It is our job to help you find new and effective ways to meet your business needs; after all this is a new system being proposed. Our team is dedicated to understanding the processes and goals of each agency's business needs.

The Office of City Planning includes the Divisions of Code Services, Community Improvement, Signs & Licenses, and Zoning which collectively manage the entire development review process for the City. The Code Services Division currently manages approximately more than 6,000 permits and 7,500 inspections per year. The case volume of the Community Improvement Division is currently unknown due to inefficiencies with the current system. However, it is estimated that there are over 5,000 blighted properties in the City. The Signs & Licenses Division manages approximately 7,000 licenses each year. The Zoning Division currently does not use a tracking system.

The City currently utilizes One Solution Permitting and Licensing software. The financial system the City currently uses is Cayenta, but this is scheduled for immediate replacement. It is hoped that the selected vendor integrate with future financial software or provide a file for electronic import for transactions.

The desired solution would provide the City with full control to customize workflows, allow applicants to apply and track applications online, and allow field staff to have full functionality to access and edit permit inspections in the field. It would also be quick to implement, cloud based, and user friendly.

TruePoint Solutions is one of the most experienced companies to provide the services City seeks for your project work. TruePoint formally commenced operations in 2005 after its founders had

enjoyed successful, long-term careers at Hansen Software, now Infor/Infor Public Sector/IPS. We have partnered with Infor Public Sector to implement the IPS software on this pursuit. .

TruePoint has grown organically over the last 13 years and has built a reputation in the market of which we are very proud. Our team now consists of 51 staff members, a team whose hard work encompasses well over 700 years of Public Sector IT experience. As TruePoint, we have implemented numerous local government accounts with third party products as well as our own product suite. We are highly regarded Services partners for the industry leaders (Infor/Hansen, Accela, DigEplan, Cityworks, Lucity, & Riva).

3. Vendor Profile and Qualifications

Include vendor and executive information, age of the company, age of the product platform being sold, whether product was originally acquired, and if so when and from whom, frequency of updates over last two years, a description of the product platform, and a description of qualifications of key staff that would be assigned to the implementation of the solution.

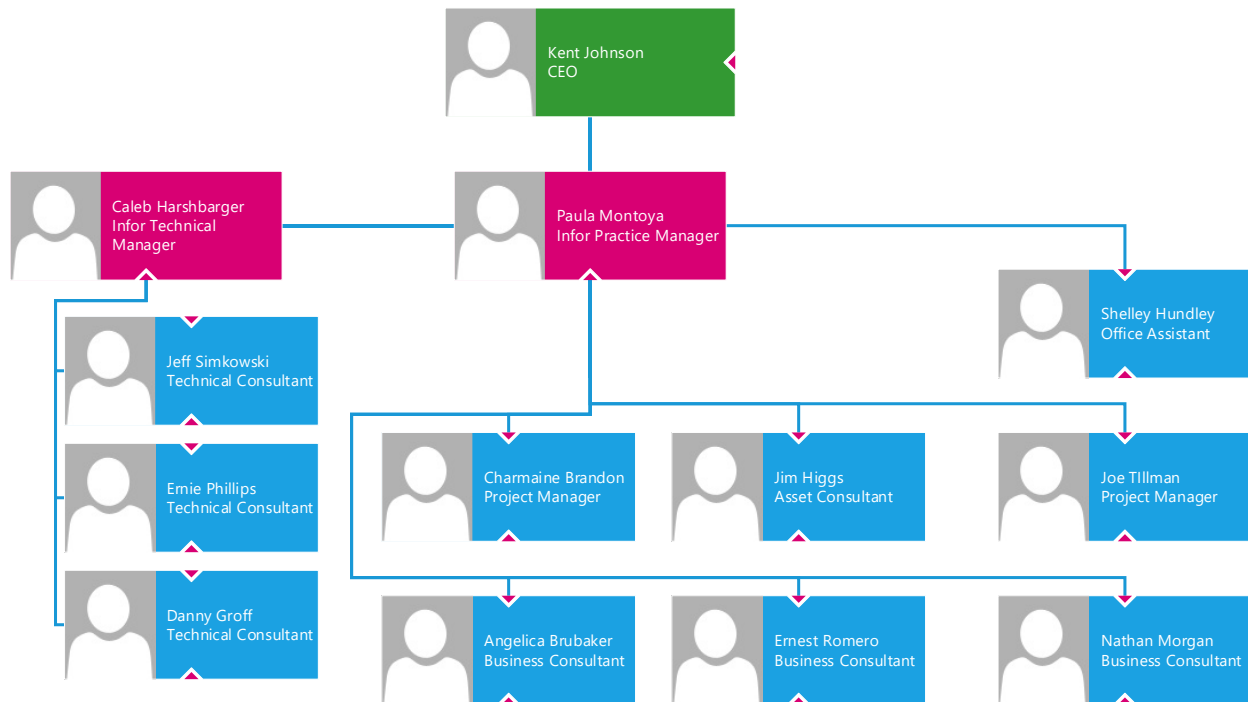
TruePoint Solutions is a privately held software and solutions company and certified Small Business Entity based in California. Established in late 2004, TruePoint formally commenced operations in 2005. Our total team of 51 staffers has amassed over 700 years of Public Sector IT experience.

Our company is significantly comprised of former Infor/Hansen employees and executives. In fact, the team at TruePoint has more than 180 years of cumulative Infor/Hansen software experience. No other services company can claim as much direct experience with these products as TruePoint Solutions.

The owners and staff of TruePoint originally had the common origin of working at the same company – Hansen Information Technologies – prior to the creation of TruePoint. This means that most of our staff have worked together for well over a decade. **In fact TruePoint's owners have worked together for over 30 years.** As a result of these long term working relationships – our entire team shares the same perspective on customer service, delivery, and ultimate client satisfaction. Our goal is to provide a mentoring approach and strategy as we configure software to meet the business and operational needs of our clients. We are confident that our team's experience and level of professionalism will meet the City's needs today, tomorrow, and for years to come.

TruePoint Staffing

As noted, we have included resumes in our proposal. We have included them as an attachment at the end of this piece.



The person in charge of the project is Paula Montoya. Paula is TruePoint's ***Infor Practice Manager***. During Paula's 19 year career in the government sector, she has had the opportunity to fulfill many project roles: Project Director, Project Manager, Technical Lead/Developer and Data Conversion Manager/Developer. Her technical skills have allowed her to have highly successful project implementations. Notable Projects led by Paula include: *Beverly Hills, CA, Calvert County, MD, Chester Water, PA, Martin County, FL, City of North Vancouver, Prince George's County, City of Monterey, CA*

The table below lists TruePoint resources who would most likely provide work under the current proposed contract. The furthest column to the right cross references that resource's experience with a number of the engagements we have provided as references.

Person	Projects
Angelica Brubaker Business Consultant	<p>Angelica is a Solutions oriented Business Analyst and possesses a unique combination of skills, including business analysis, user acceptance testing and applications development. Her skills also include: Requirement tracing, Business process improvement, Functional requirements and Requirements gathering.</p> <p>Notable Projects: City of North Vancouver, Prince George's County, MD</p>
Caleb Harshbarger Technical Manger	<p>Caleb Harshbarger is a technical implementation consultant focused on programming, database management and user interface design. His programming language experience includes PL/SQL, C++, C#, Java, JavaScript, Visual Basic, XML, HTML, CSS, PHP, and Perl. Caleb has worked with Oracle, Access and MySQL Server.</p> <p>Notable Projects: City of Monterey, City of North Vancouver, Prince George's County, MD, Calvert County MD</p>

Danny Groff Technical Consultant	<p>Danny Groff is a technical Implementation consultant focused on programming, database management and user interface design. He has Certifications in the following areas; CIW Web Design Specialist, CIW Database Design Specialist, CIW JavaScript Specialist, CIW Perl Specialist, CompTIA Project+ and Oracle Java SE 6 Programmer.</p> <p>Notable Projects: Chester Water Authority, PA, York County, VA</p>
Ernie Phillips Technical Consultant	<p>Ernie is a technical implementation consultant focused on programming, database management and user interface design. His Software Experience includes Microsoft Visual Studio 2008-2010-2012-2013-2015, Microsoft Office Suite 2003-2007-2010-2012-2014, Adobe Master Suites, CS-CS5, Cisco VPN Clients, AutoCAD 2003-2012, VMPlayer, VMWare Client, VSphere, MySQL, Report Builder, Sql Developer, Sql Management Studio, EDNA, Siems Scada System, GE Scada System, CERNER and Synergy SIS. Ernie's programming experience includes C#, VB.NET, CSS, PLSQL, MS-SQL, ASP.NET MVC, Java Script, PHP, HTML5 and Agile Methodologies.</p> <p>Notable Projects: Calvert County, MD, Prince George's County, MD, Beverly Hills, CA</p>
Jeff Simkowski Technical Consultant	<p>Jeff Simkowski is a technical implementation consultant focused on programming, database management and user interface design. His programming language experience includes SQL, XML, ObjectPAL, C, C++, C#, Ruby, Python, Excel VBA, HMTL5, CSS3, Javascript, Visual BASIC, DOS batch scripting and Auto-Hotkey. Jeff is a solutions-based software developer/project manager/validation automation engineer with over 15 years of experience in the high technology industry, including 9 years in the database creation/support field. His experience includes Project Management, Software Development, Quality Assurance, Validation Automation, debug, software versioning, peer code review, Agile/Scrum/Kanban methodologies, data analysis, requirements/resource planning, validation test planning/auditing, documentation creation, data reporting, presentation and training/mentoring</p> <p>Notable Projects: City of Monterey, City of North Vancouver, Prince George's County, MD, Vacaville, CA</p>
Nathan Morgan Business Consultant	<p>Nathan has several years of project management, developing and implementing strategic goals in cross functional teams. He comes to us with SAP business Intelligence super user performing, report building and identifying issues.</p> <p>Notable Projects: City of North Vancouver, Prince George's County, MD</p>

Our Partner, Infor Public Sector (IPS/Infor), is one of the world's largest providers of enterprise software, with approximately \$2.9 billion in revenue and is one of the fastest growing business software providers, with more customers than our two largest competitors combined. Infor has experienced phenomenal growth during our history. We provide a full complement of software and services including integration, technology, project management, and business best practices consulting. IPS develops and supports their own applications with an annual development expenditure of approximately 16%.

Government agencies, public authorities, and educators face challenges that loom larger by the day. Your constituents want expanded services, greater accountability, and more transparency. Yet these demands come at a time when you are seeing a consistent decrease in budgets and

funding, stringent limits on federal and state aid, and a physically and technologically aging infrastructure.

Built to specification, Infor Public Sector is designed to meet the needs of Public Sector organizations like the City of West Palm Beach. Infor knows that the responsibilities of Public Sector organizations are unlike those of any private business. For that reason, business-centric, generic software solutions do not precisely adapt to help you meet your unique operational needs. The need is too specific, too unique to pursue any other strategy.

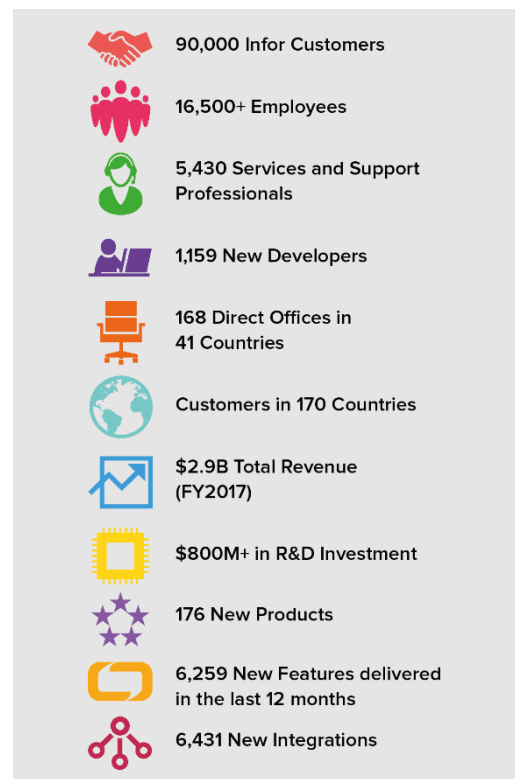
Through over 30 years of experience in the Public Sector, Infor has developed the expertise to engineer solutions that will produce fast, far-reaching results and provide system-wide transparency. In addition, Infor is committed to preserving the value of your technology investment over the long haul, which will allow the City to benefit from our aggressive investment strategy and continuous innovation.

Infor is at work today providing fast, far-reaching results and system-wide transparency for over 4,100 government agencies. Many types of organizations benefit from our Public Sector solutions, including State, Provincial, Local, Federal, and Municipal governments. Infor's experience includes work with 3 of the top 5 transit authorities, 19 of the 20 largest states, and 18 of the 20 largest US cities.

Infor is one of the largest providers of enterprise software in the world, with approximately \$3.1 billion in revenue and is one of the fastest growing business software providers, with more customers than our two largest competitors combined. Infor has experienced phenomenal growth during our history. We provide a full complement of software and services including integration, technology, project management, and business best practices consulting. We develop and support our own applications with an annual development expenditure of approximately 15.7%.

Government agencies, public authorities, and educators face challenges that loom larger by the day. Your constituents want expanded services, greater accountability, and more transparency. Yet these demands come at a time when you are seeing a consistent decrease in budgets and funding, stringent limits on federal and state aid, and a physically and technologically aging infrastructure.

Infor Public Sector, Inc. has been in business since 1983. Infor originally purchased Hansen Information Technologies in June 2007. Hansen was originally founded in 1983. Infor officially changed the name from Hansen Information Technologies to Infor Public Sector, Inc. in 2012.



Built to specification, Infor Public Sector is designed to meet the needs of Public Sector organizations like the City of Jackson. We know that the responsibilities of Public Sector organizations are unlike those of any private business. For that reason, business-centric, generic software solutions do not precisely adapt to help you meet your unique operational needs. The need is too specific, too unique to pursue any other strategy.

The proposed Infor Public Sector (IPS) Community Development and Regulation (CDR) solution was originally released in 1996. At the time, the client server based permitting solution was unique in that it was fully integrated with other functional areas of state and local government. The IPS solution was, and still is, a full spectrum government solution, with various modules all fully integrated out-of-the-box. The product evolved over time as the industry changed and our client base provided direction on functionality. Our early customers tended to be large local governments that managed the full spectrum of land and permitting management. In the late nineties, the CDR product was integrated to GIS, a relatively new government solution. We have been closely aligned with several GIS providers since that time, including ESRI. Most of the early CDR clients such as Montgomery County, MD, Stafford County, VA, and Chicago, IL are still with Infor, and tend to be very active in the product direction.

In 2004, the product architecture took a big leap forward, as it was rewritten to become a web-based product. This was rapidly adopted by our clients and new agencies, as it eliminated the need for desktop applications and maintenance. Our client base grew exponentially during this period. Infor and our cloud provider, AWS, made a large investment in 2013/2014 to enable the solution to reside in the cloud as a SaaS solution. Currently it is offered as both an on-premise and cloud/SaaS solution. Infor continues to invest heavily in the IPS solution with new development efforts centered on built in Business Analytics, Citizen/Business Portals, mobility, and even AI. The continued investment by Infor and the stability of the company ensure that the IPS products will meet the needs now and well into the future.

Through 35+ years of experience in the Public Sector, Infor has developed the expertise to engineer solutions that will produce fast, far-reaching results and provide system-wide transparency. Plus, Infor is committed to preserving the value of your technology investment over the long haul, which will allow the City to benefit from our aggressive investment strategy and continuous innovation.

The history of the Infor Public Sector CDR Suite is illustrated in the figures below:

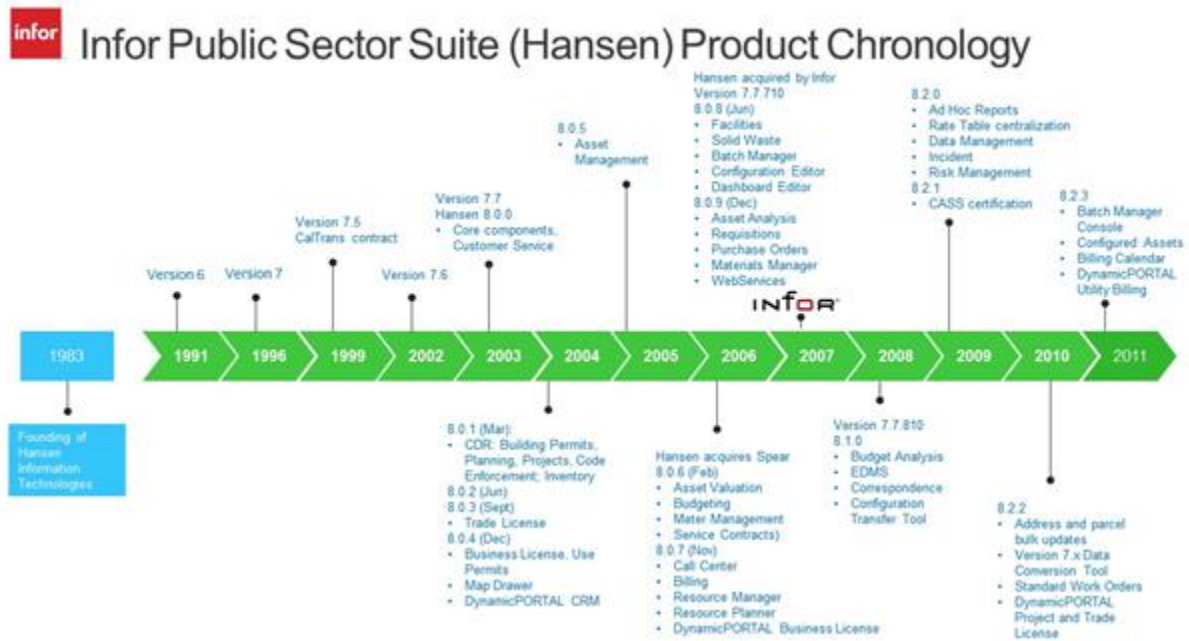


Figure 1: Part 1 - Infor Public Sector Release and Milestone History

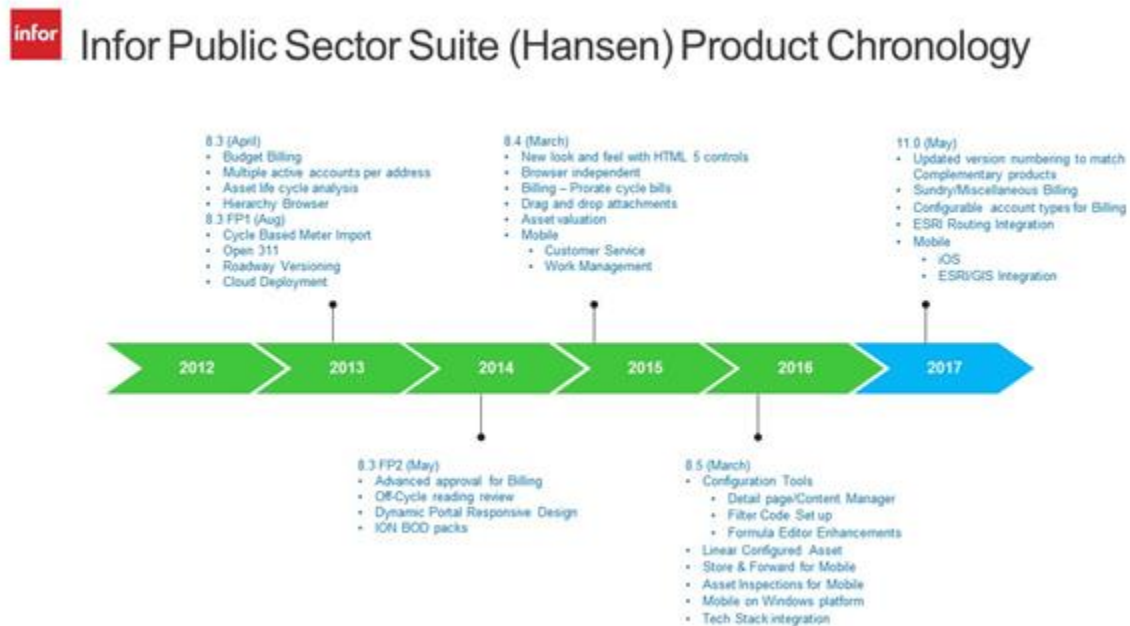


Figure 2: Part 2 - Infor Public Sector Release and Milestone History

Major upgrades are released once per year with patches being released bi-monthly. Enhancements and critical bug fixes are released periodically throughout the year as needed. The next release is scheduled to come out soon – Spring/Summer 2019.

Through over 35 years of experience in the Public Sector, Infor has developed the expertise to engineer solutions that will produce fast, far-reaching results and provide system-wide transparency. Plus, Infor is committed to preserving the value of your technology investment over the long haul, which will allow the City to benefit from our aggressive investment strategy and continuous innovation.

4. Experience

Provide a description of local government experience and experience completing similar projects.

Infor Public Sector has been providing software applications to specializing in government operations for over 35 years. Infor is hard at work today providing fast, far-reaching results and system-wide transparency for over 4,100 government agencies. Many types of organizations benefit from our Public Sector solutions, including State, Provincial, Local, Federal, and Municipal governments. Our experience includes work with three (3) of the top five (5) transit authorities, 18 of the 20 largest states, and 18 of the 20 largest US cities. There are over 200 IPS specific customers.

Some examples of the large customer footprint include the following

- City of Boston, MA
- City of Chicago, IL
- City of Vancouver, WA
- San Antonio Water System
- Sedgwick County, KS
- City of Las Vegas, NV
- Montgomery County, MD
- City of Houston, TX
- Louisville-Jefferson MSD, KY
- City of Minneapolis, MN
- City of Long Beach, CA
- DeKalb County, GA
- Marin County, CA
- City of New York, NY (DEP)
- City of Orlando, FL

5. References

Provide at least five (5) references of current clients of similar scope with the proposal. Include name, title, address, phone number and email of contact person.

1. Calvert County, MD

176 Main Street, Suite 102

Prince Frederick MD 20678

Kathy O'Brien, Program Manager

(410) 535-1600 ext. 2307

obrienkm@co.cal.md.us

2. City of Beverly Hills, CA

Public Works Services Department

345Foothill Road
Beverly Hills, CA. 90210
Michelle Tse
Infrastructure and Field Operations
City of Beverly Hills
Public Works Services
Tel 310-285-2486
mtse@beverlyhills.org

3. City of Minneapolis, MN

Contact: Melissa Stover; ELMS Team Lead, IT
Address: 350 S. Fifth St., Room 400, Minneapolis, MN 55415
Email: Melissa.stover@minneapolismn.gov
(This individual would prefer to be contacted via email rather than phone)

4. York County, VA

Contact: Randy Yokum; IT
Phone: 757-890-3757
Email: ryokum@yorkcounty.gov

5. City of Springfield, OR

Daniel A. Haight,
GIS Manager
City of Springfield
dhaight@springfield-or.gov
541-726-3710

Glenn Witzig (Data Mgt. Tech.)

201 S.18th Street

Springfield, OR 97477

Email: gwitzig@ci.springfield.or.us

Phone: +15417263614

6. Glynn County, GA

Contact: James Manning; System Administrator

Address: 1725 Reynolds Street, Suite 301, Brunswick, GA 31520

Phone: 912-554-7164

Email: jmanning@glynncounty-ga.gov

7. City of Boston, MA

Contact: Georges Hawat, Director of IT Solutions, Department of Innovation and Technology

Address: One City Hall Plaza Boston, MA 02201

Phone: 617-635-4783

Email: georges.hawat@cityofboston.gov

6. Software Description

Please provide answers to the functional requirements and implementation requirements of this RFP.

The Infor Public Sector Suite, Community Development & Regulation (CDR) solution components include the following:

- Infor OS Platform Technology
- Ming.le Collaboration
- Home Pages & Dashboards
- Infor Document Management
- Infor ION API gateway
- Community Development & Regulation:
 - Planning and Permitting
 - Business & Trade Licensing
 - Code Enforcement Management
 - Incident & Case Management
 - Billing and Revenue Management
- Customer Self-Service Portal
- Mobile Inspections

The Infor Public Sector Community Development and Regulation suite (IPS CDR), is a cloud-based SaaS application that provides a highly configurable and powerful application suite containing a set of cloud-based tools to manage the everyday needs of an agency's economic development and regulatory needs. From Land Use Planning to Permitting & Licensing then on to Code Enforcement, Infor Public Sector has you covered.

The Infor Public Sector Community Development & Regulation suite will allow agencies to quickly modernize their operations by adding modern technology coupled with sleek design all hosted in the Amazon cloud powered by Microsoft SQL Server; the Infor Public Sector Solution will maximize your investment and provide true value.

An enterprise solution for all regulatory needs

Provide streamlined and powerful Planning & Permit management to all your customers. With the Infor Public Sector Solution (IPS), agencies can provide a single solution that covers all the needs for your land management needs. IPS provides a single integrated cloud-based application with a full back-office application, a public portal with customer self-service features, a mobile inspections module and more.

Manage all agency Planning, Permit and Regulatory functions in a single system:

- Track applications for Planning, Permits, Licenses, Inspections and Code Enforcement
- Integrated workflow engine for complex business rules.
- Provide customers a self-service application and account management portal

Perform Inspections and Enforcement actions in the field:

- Investigate complaints from the field

- Inspector routing provides an optimal route for daily inspections
- Integrated map provides locations of other nearby Permits or Licenses
- Search live records in the field

Automate Fee Invoicing & increase revenue:

- Automatic Invoicing for renewals and late fees keeps contacts informed and engaged with an agency
- Provide industry standard delinquency and collections capabilities for revenue tracking
- Provide customers a self-service payment portal
- Manage the complete financial history of a license record

Built with an enterprise cloud operating service as its foundation:

- One single integrated platform
- Role-based Analytics at the core
- Manage API Gateway for integrations
- Document Management System
- Home Pages and Dashboard Management
- Enterprise workflow alert and task management

Infor Public Sector Planning & Permitting

- Complete Enterprise Suite for Planning, Permitting
- Automated Revenue Management
- Maintain unlimited number of record types and workflows
- Integrated Customer Portal for application submission

Municipalities use the IPS Planning Module to track their long-term development planning for their communities. Land-use planning seeks to order and regulate land use in an efficient and ethical way, thus preventing land-use conflicts.

Governments use land-use planning systems such as IPS to manage the development of land within their jurisdictions. In doing so, the governmental agency can plan for the needs of the community while safeguarding natural resources. A land-use plan provides a vision for the future possibilities of development in neighborhoods, districts, cities, or any defined planning area.

The Infor Public Sector Suite (IPS) Planning module is specifically designed to address the complex and multi-layered approvals required in these land use transactions.

The IPS solution is modular by design, which will allow an agency to add on new planning workflows and departments or add any new modules/functionality at their own pace.

Infor Public Sector Planning

- Track land use applications
- Manage “Conditions of Approval”

- Track bonds & escrow accts
- Perform Site Inspections
- Assign, schedule and manage reviews and approvals
- Manage hearings & meetings
- Assess and collect fees

The IPS Planning Module manages all the Land Use Applications for an agency. Large Projects such as subdivisions, new commercial construction or large mixed used projects are easily managed. The IPS Planning Module will provide a complete solution to manage applications from submission to approval. As with other IPS modules, application workflows can make use of reviews and approvals, fees, conditions, inspections and hearings. Once a project has been approved, inheritance rules can pass restrictions and conditions to resulting building permit applications for a project.

IPS Planning conditions can be used to manage all the approvals or large-scale construction projects, such as subdivisions or shopping centers. These planning conditions are then passed down from a planning application to its child building applications to enforce the guidelines set out by the plan. Planning conditions of approval are either requirements imposed on applications or information provided to members of your agency or other agencies. For example, a planning condition might require

The screenshot shows the 'Planning Application InfoViewer' for application 2018SUB-1000. It includes fields for Application Type (SUBDIV), Sub Division (AAA Consulting Engineers), and Location (PARCELS LOCATED NORTH OF HARRY BYRD HIGHWAY ROUTE 71). It also displays a 'Status Dates' table with columns for Processed, Approved, Paid, Temp CDD, and CDD, each with a date and user. A 'Job Description' section lists project details like Project Name (Scenic Heights), Work Type (RES), and various fees and valuations.

The screenshot shows the 'Conditions' tab for application 18-08-CUP1004. It displays a table of 'Conditions (1 records)' with columns for Condition Type, Approval, Approved By, Approval Date, Applied By, Applied Date, Assigned To, Supervisor Required, and Comments. Below this, there is a section for 'Planning Conditions (4 records)' with a table listing conditions such as Building Style, Building Facades, External Lighting, and Land Use Approval Expiration, each with its status and department.

that all grading permits be closed before a planning permit can be issued for a subdivision, or it might provide special handling instructions.

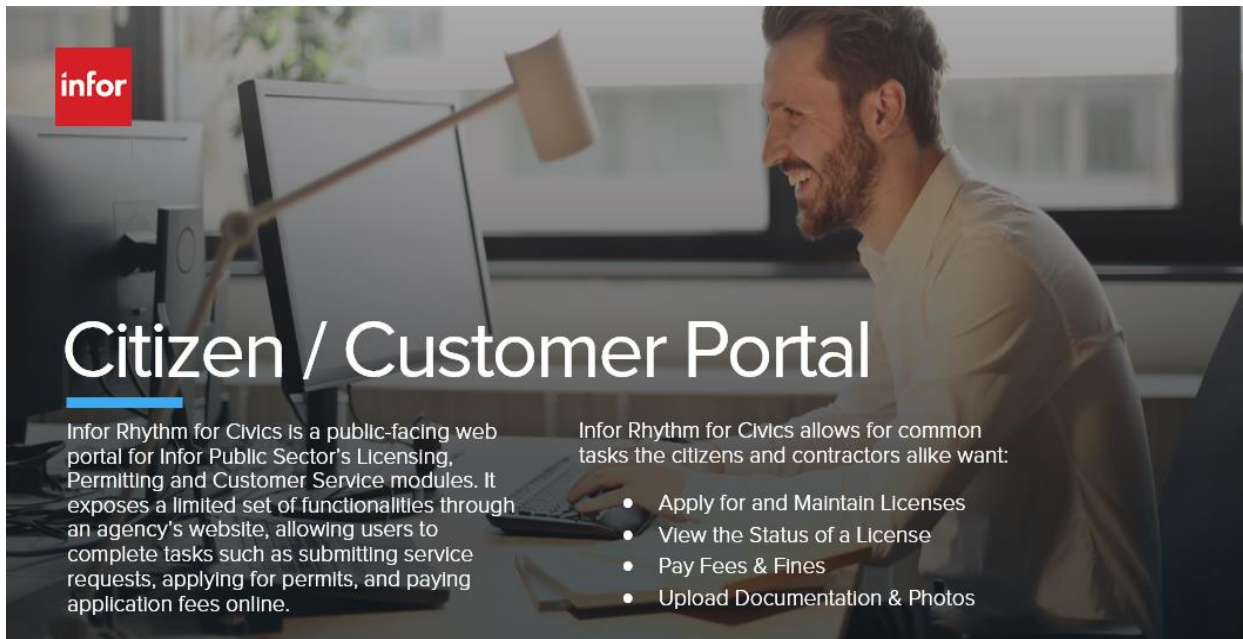
Infor Public Sector Permitting

Municipalities all over the country grapple with the complex and unique rules & regulations that each community must adhere to when issuing plan approvals and permits. As the economy grows so does the need to expand and provide for population and business booms. Businesses and communities are constantly expanding and the need for technology in permitting is more evident than ever.

More and more municipalities are moving to a more public and government collaboration model to effectively drive customers to compliance. This new model is in direct contrast with the past practice of starting a project conversation with “NO”.

With the Infor Public Sector Suite, municipalities can quickly adopt current technology while not having to give up control of process or workflow. IPS works as you do, not the other way around.

The IPS system has three major components.



Citizen / Customer Portal

Infor Rhythm for Civics is a public-facing web portal for Infor Public Sector's Licensing, Permitting and Customer Service modules. It exposes a limited set of functionalities through an agency's website, allowing users to complete tasks such as submitting service requests, applying for permits, and paying application fees online.

Infor Rhythm for Civics allows for common tasks the citizens and contractors alike want:

- Apply for and Maintain Licenses
- View the Status of a License
- Pay Fees & Fines
- Upload Documentation & Photos

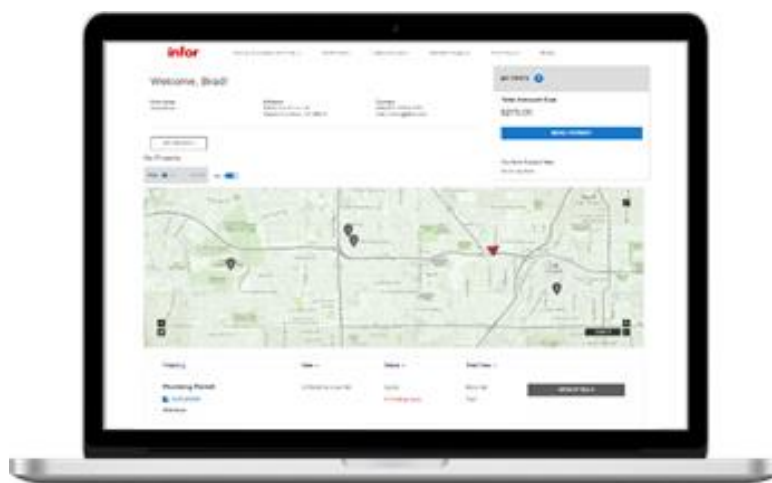
1 - The Customer Portal – A full service, pre-integrated customer facing website that gives the public access to submit registration and license records. Public users can also search for existing licenses or registrations to see the status of these records. The customer portal allows for users to submit applications with supporting documentation that is then stored in the document management system and used for license review or issuance.



The Customer Portal View in multiple device formats.

Civics includes a drag-and-drop editing interface, allowing website building and maintenance directly from the browser. A responsive grid architecture enabling all pages, forms, and flows consistently deliver consumer-grade web experiences across all devices.

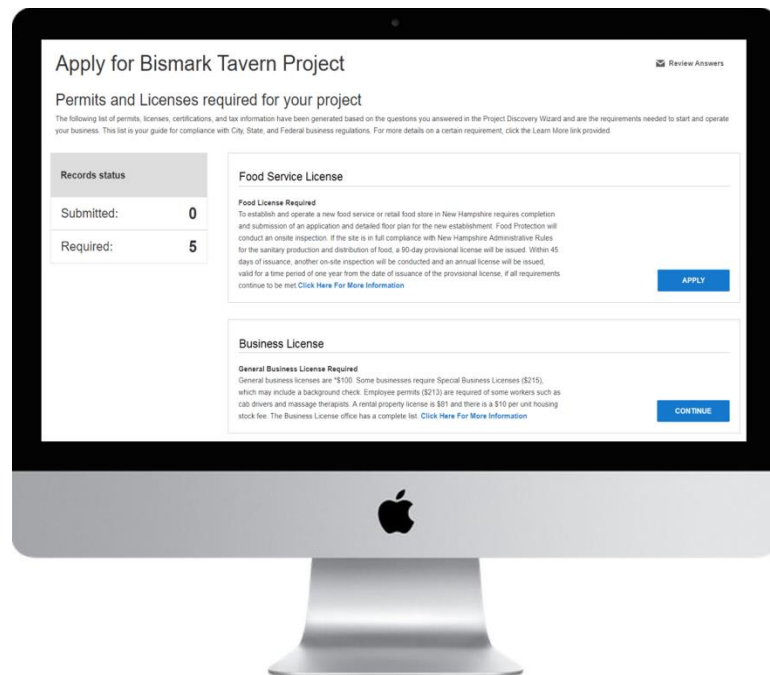
Civics is built using a structured widget framework powered by LifeRay and hosted on the Amazon Web Services cloud to help ensure reliability and security. Customers can view a project dashboard that provides citizens a complete view of relevant and related application information regardless of the handling department. Interactive map-based data visualizations allow residents and businesses to access personal and public records in-context to spatial data and layers.



IPS Customer Portal – License & Permit Dashboard (GIS View)

The Rhythm Portal also supplies a user discovery wizard. The discovery wizard is designed to answer common questions in an online interview which will determine what actions are needed to comply with a task e.g. a customer may not know what kind of license they need to perform a specific job or task. The

discovery wizard can lead the applicant down a series of questions that can then determine the permits or licenses needed. The discovery wizard can seed all the collected information directly into the applications to avoid duplicate entry.



IPS Customer Portal - Discovery Wizard Results

2 - The Back-Office Solution – The core application that all components communicate and store data to. The back-office solution is where all the configuration for the different license types are managed and pushed out to the portal for public consumption. All business rules and forms are maintained via the back-office solution.

Manage all agency licenses, registrations and renewals in a single system

- Integrated workflow engine for complex licenses rules
- Provide customers a self-service application and account management portal
- Manage the complete financial history of a license record

Automate license renewals & increase revenue

- Automatic Invoicing for renewals and late fees keeps licensees informed and engaged with an agency
- Provide industry standard delinquency and collections capabilities for revenue
- Provide customers a self-service payment portal
- Manage the complete financial history of a license record

Perform Inspections and Enforcement actions in the field

- Investigate complaints from the field
- Inspector routing provides an optimal route for daily inspections
- Integrated map provides locations of other nearby licenses

Includes an enterprise cloud operating service as its foundation.

- One single integrated platform
- Role-based Analytics at the core
- Manage API Gateway for integrations
- Document Management System
- Home Pages and Dashboard Management
- Enterprise workflow alert and task management

3 - The Mobile Solution Infor Field Inspector for Business License and Permit Inspections is highly configurable and is designed to address the needs of many different users and organizations.

Infor Mobile Inspector is supported on all three major mobile platforms. Each application can be downloaded from the respective app store for each platform. The mobile inspector is only available in tablet format.

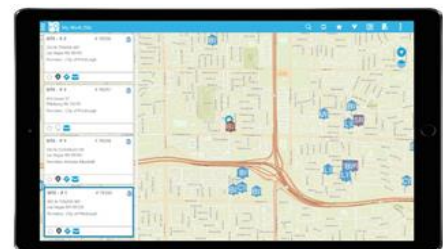
The application relies on user profiles to match the content that is displayed to the specific user's job functions. For example, Infor Field Inspector CDR provides different information for a Business License supervisor versus a code enforcement inspector. Organizations are also able to customize the out-of-the-box functionality and page layouts to accommodate individual needs.

Infor Field Inspector CDR is enabled with both Geographic Information Systems (GIS) and Global Positioning System (GPS), allowing users to look up information on a map and to search for records within a certain distance of the mobile device's location.

Once deployed to the field, inspectors can complete and result assigned Inspections or service requests. The ability to log violations and issues during an inspection is made easy using the app. The mobile field inspector can take pictures with the integrated camera and seed the picture into the inspection as an attachment. Additionally, if an inspector encounters an issue in the field, they can create a new service request or case record to mitigate the issue.

Major Features Include:

- Store and Forward Capability for disconnected use
- Take and attach photos
- GIS Integration with back office maps
- Logical Routing to assist crews with optimizing large routes
- All major platforms supported (Windows, Android, iOS)



Infor Revenue Management

A full featured cashiering and revenue management system. From Fee to Invoice, including delinquency, collections and lien capability. The IPS solution will cover all your needs.

A distinct advantage of the IPS system is the integrated billing and invoicing capabilities. IPS provides a single solution to charge, invoice and collect on fees that are due from license or permit renewals.

Features Include:

- Automated Billing Engine for all License Fees, Renewals and Fines
- Delinquency Management
- Collections Management
- Lien Management
- Automated Notices
- Online Payment Portal
- Payment Arrangements

The screenshot shows the 'Manage Account' page for Emily Knight. It displays account information, a summary of bills and payments, and a list of licenses/permits. The current balance is \$375.00, and the total balance is \$925.00. The interface includes tabs for Alerts, Account (CDR), Bills, and Licenses/Permits/Cases.

IPS billing recognizes all charges that are created within the Licensing and Permitting system. Once a fee has been identified as unbilled, the IPS system will add it to the next invoice that is generated for the account. Agencies can choose to create accounts for every license that is generated or can aggregate accounts by creating a single account for an individual contact.


IPS Invoicing

An added convenience with the IPS solution is the automatic invoicing capabilities that are embedded into the system. All fees can be transferred to an aging invoice for tracking of payment; making invoicing for all fees very easy.

Incorporate pixel perfect reporting provided by the Infor Birst reporting tool to create stunning reports with

The screenshot shows the 'Account Information' and 'Notice of Violation' pages. The account information includes details for Emily Knight, including address and contact information. The notice of violation details a traffic violation for a vehicle with license plate 474-XTD, including the date, time, and location of the violation.

personalized logos and existing look and feel.



INFOR PUBLIC SECTOR

Office of Licenses

60 Niagara Sq. 10th. Fl.

056555-1212

BANNER SERVICE COMPANY

#	LICENSE #	LICENSE ADDRESS	RESPONSIBLE PARTY	BILL AMT	CURRENT	PAST DUE	PENALTY
1	2013-ANL1367	8216 ABERCROMBIE	Marcelo Morales	\$2,120.00	\$2,120.00	\$0.00	\$0.00
2	2013-ANL1368	1001 ACADEMY	Alexander Robles	\$2,120.00	\$2,120.00	\$0.00	\$0.00
3	2013-ANL1369	480 LACABANA BEACH	Monica Schmitz	\$9,216.00	\$9,216.00	\$0.00	\$0.00
4	2013-ANL1370	6420 PENROSE	Emily Knight	\$2,120.00	\$2,120.00	\$0.00	\$0.00

GENERAL RETAIL

#	LICENSE #	LICENSE ADDRESS	RESPONSIBLE PARTY	BILL AMT	CURRENT	PAST DUE	PENALTY
5	2013-ANL1365	415 PARK VISTA	Emily Knight	\$1,820.00	\$1,820.00	\$0.00	\$0.00
6	2015-ANL2405	2212 TALL PINE	Emily Knight	\$1,440.00	\$1,440.00	\$0.00	\$0.00

LOAD ZONE PERMIT

#	LICENSE #	LICENSE ADDRESS	RESPONSIBLE PARTY	BILL AMT	CURRENT	PAST DUE	PENALTY
7	14-LDZ-1395	2436 GINGER LILY	Mr Michael A Rivera	\$2,880.00	\$2,880.00	\$0.00	\$0.00
8	14-LDZ-1396	2428 GINGER LILY	Mr Michael A Rivera	\$1,440.00	\$1,440.00	\$0.00	\$0.00
9	14-LDZ-1397	2405 GINGER LILY	Alexander Robles	\$1,440.00	\$1,440.00	\$0.00	\$0.00
10	15-LDZ-1398	2432 GINGER LILY	Mr Michael A Rivera	\$2,880.00	\$2,880.00	\$0.00	\$0.00

RESTAURANT

#	LICENSE #	LICENSE ADDRESS	RESPONSIBLE PARTY	BILL AMT	CURRENT	PAST DUE	PENALTY
11	2013-ANL1368	105 CLIFTON HEIGHTS	Jerome Valverde	\$2,160.00	\$2,160.00	\$0.00	\$0.00
12	2017-ANL13434	1115 10TH	Donna May	\$1,440.00	\$1,440.00	\$0.00	\$0.00
13	2018-ANL23430	6516 PENROSE	Mrs Angel M Blair	\$2,880.00	\$2,880.00	\$0.00	\$0.00

BILL DATE

DUE DATE

CREATED BY

CREATED ON

BILL RUN #

10/01/2018

11/01/2018

ebishop

10/10/2018

54995

IPS Cashiering & Payments

Infor Public Sector (IPS) Cashiering provides the tools that your agency requires to accept customer payments, manage the transactions performed by your cashiers, monitor drawer balances and provide a transaction journal to the financial system of record.

The IPS cashiering system requires the agency to issue a cash register drawer every day that transactions are to be performed to a cashier. The process of issuing a drawer within the IPS system also establishes a payment batch for each cashier to track all the payments and financial transactions they perform. After cashiers are assigned to active cash drawers, they can begin accepting payments.

The IPS Cash Register makes it easy for users to find charges and accept payments for License and Permit transactions, in bulk or on an individual basis. IPS cashiering will issue a receipt for each transaction performed.

All transactions will be batched and tracked by cashier. Supervisors can monitor transactions and drawer statuses remotely via the included manager console.

Once cashiers are done taking in payments for the day, they must reconcile their drawer/funds (Checks, Cash, Vouchers, Escrow Deposits etc.) against what IPS has recorded that they should have in their drawer. This process of reconciliation is called “Drawer Count Out” process. IPS provides a count out form for the cashier to enter the values of the media (cash, checks etc.) that is in their possession. Once a drawer is counted out and no discrepancies exist, the transactions can be posted to a payment batch.

Account Management

Inventory

Work Management

Incident

CDR Common

Permitting

Planning

Project

Cash Management

Licenses

Trade Licenses

User Profiles

Customer Service

My Info

Cash Register (CAGR)

Monitor Cashiering (CAMC)

Content Manager

Display Criteria

Drawer Status

Non Closed

Cash Drawers

▼ Down arrow #020109 03:26

All Available Cash Drawers (16 records)

	User?	Drawer	Status	Cashier	Register Group	Register ID	Total	Deposits	Adjustments	Cash	Check	Credit
▼	1041 - Michael A Rivers	<input type="checkbox"/>	1002	Inactive	Dynamic/Partial Payment	07-000000	\$571,143.73	\$0.00	\$2,733,885.41	\$0.00	\$4,261.92	\$565,881.91
▼	1047 - Christian Ajaque	<input type="checkbox"/>	1003	Inactive	Dynamic/Partial Payment	07-000000	\$7,306.69	\$0.00	\$0.00	\$7,306.69	\$0.00	\$0.00
▼	1047 - Elizabeth Shinkle	<input type="checkbox"/>	1004	Inactive	Michael A Rivers	Permit Counter	\$51,161.00	\$0.00	\$0.00	\$2,000.00	\$22,161.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1007	Inactive	Christian Ajaque	Permit Counter	\$42,363.80	\$0.00	\$0.00	\$42,363.80	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1008	Inactive	Earl Bishop	Permit Counter	\$25,038.99	\$0.00	\$0.00	\$4,832.70	\$10,000.00	\$10,206.29
▼	1004 - Michael A Rivers	<input type="checkbox"/>	1009	Inactive	Elizabeth Shinkle	Permit Counter	\$1,491.42	\$0.00	\$0.00	\$400.00	\$387.44	\$693.98
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1012	Inactive	Michael A Rivers	Permit Counter	\$6,077.00	\$0.00	\$0.00	\$5,627.00	\$0.00	\$450.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1013	Inactive	Michael A Rivers	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1014	Inactive	Michael A Rivers	US Front Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1015	Inactive	Elke Kim	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1016	Inactive	Michael A Rivers	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1017	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1018	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1019	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1020	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1021	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1022	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1023	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1024	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1025	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1026	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1027	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1028	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1029	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1030	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1031	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1032	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1033	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1034	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1035	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1036	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1037	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1038	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1039	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1040	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1041	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1042	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1043	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1044	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1045	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1046	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1047	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1048	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1049	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1050	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1051	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1052	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1053	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1054	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1055	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1056	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1057	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1058	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1059	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1060	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1061	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1062	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1063	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1064	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1065	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1066	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1067	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1068	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1069	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1070	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1071	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1072	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1073	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1074	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1075	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1076	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1077	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1078	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1079	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1080	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1081	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1082	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1083	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1084	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1085	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1086	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1087	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1088	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1089	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1090	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00
▼	1047 - Michael A Rivers	<input type="checkbox"/>	1091	Inactive	Christian Ajaque	Permit Counter	\$100.00	\$0.00	\$0.00	\$100.00	\$0.	

Functional Requirements

Requirement	Response	Comment
1. General:		
Provide modern web form capabilities that allow for easy editing of forms and that clearly define workflows for customers and staff.	Yes	The IPS system is a web-based application that requires no client workstation installations. All forms are editable and customizable through the in-application content manager. The workflow manager enables staff to update workflow pertinent to both customers and agency users.
System must allow online submission and payment of permits, licenses and related activities.	Yes	Rhythm for Civics lets the public submit and pay for permits, licenses and other related activities. It is integrated with the IPS back-office database.
System should be cloud hosted.	Yes	Cloud hosting is available for IPS
All solutions must clearly explain the City's ability to export information from the system in the event of the maintenance contract being terminated.	Yes	Upon termination or expiration of hosting agreement, Infor will provide a secure FTP site and help the City download all data back on-site or to another Cloud provider.
2. Data:		
Maintain and manage all data related to the system and Integrate with ESRI ArcGIS Online.	Yes	The main component of the data layer is an Oracle or SQL Server database that stores the agency's data. The data structure exists independently of the specific database application. Each distribution of Infor Public Sector includes a full description of the data structure, which the Infor Public Sector Installer uses as a blueprint to build the actual database during the installation process. When installation is complete, you can use the Schema Manager in Infor Public Sector to review the details of the data structure and to add and update agency tables as needed. The application has an integrated map viewer called Map Browser. It consumes data published from ArcGIS Online.
3. Permitting:		
Monitor all building activity, issue a variety of permit types (building, mechanical, electrical, plumbing, floodplain, land disturbance, etc.), link to related records, account for all appropriate fees, and validate that contractors are licensed with the City.	Yes	This is achieved through standard workflow configuration
The City would like the capability to have some permits that require no additional administrative review following submission and payment to have the capability to be instantly/automatically approved.	Yes	This is achieved through standard workflow configuration
Also desire dating functionality that would alert customer and staff of the pending expiration of a permit.	Yes	This is achieved through standard workflow configuration

The City requires the ability to customize permit number formatting.	Yes	The system autogenerates numbers based on agency requirements
The City requires a solution that includes the ability to flag a property or parcel with a "Stop Work" directive and double fees on designated properties.	Yes	This is achieved through standard workflow configuration
The City would prefer a solution that includes functionality for a customer to see an estimate of the fees that will be required for a permit prior to submission.	No	The system does not provide estimates prior to submission
4. Licensing & Contractor Registration:		
Provide licensing functionality including contractor licensing that can be directly integrated into the permitting process.	Yes	This is standard functionality of the application
Allows for automated renewals of licenses and contractor registrations that are required annually.	Yes	This is standard functionality of the application
5. Inspection Tracking and Scheduling:		
Allow automatic creation of specific inspection types based on permit applications.	Yes	This is standard functionality of the application
Track both routine and periodic inspections of buildings and property, and manage all building inspection scheduling activities.	Yes	This is achieved through standard workflow configuration
Allow online customer inspection requests and provide calendaring functionality for inspectors that allow them to easily create a daily schedule from inspection requests.	Yes	This is standard functionality of the application
Allow real time inspection results to be publicly available to all users including via email to permit holder.	Yes	This is achieved through standard workflow configuration
Provide dating functionality that provides reminders for permits and inspections with no activity.	Yes	This is standard functionality of the application
The City would prefer functionality that allows an inspector to see a map of their daily inspections.	Yes	This is standard functionality of the application
Permits should automatically close upon a successful final inspection.	Yes	This is achieved through standard workflow configuration
6. Plan Application Tracking/Workflow:		
Provide on-line reporting capabilities for all permit applications and license reviews from permit submission to issuance.	Yes	This is standard functionality of the application
The system should provide a visual workflow status that is clear to both the customer and internal staff.	Yes	This is standard functionality of the application
7. Reporting:		
Generation of reports using any combination of data elements maintained by land use and permitting systems.	Yes	All data in the system can be used in any combination.

A dashboard that overviews activity levels and that is capable of being made public is preferred.	Yes	The system allows for agency approved reports and dashboards to be exposed through the public portal.
The City desires automated reports that can be emailed on a pre-defined schedule as well as a publicly (without registration) viewable list of registered contractors.	Yes	The system provides a robust correspondence module that includes a batch manager that allows for the automatic printing of reports. Reports can be attached to emails.
8. Code Enforcement:		
Allows for the monitoring of codes and management of violations associated with all building projects and property maintenance.	Yes	Violations are tracked at the property level as well as being associated with the case and the contacts associated with the violations and processes.
Includes dating functionality that provides reminders for follow-up inspections or needed activities.	Yes	The system provides a robust correspondence module that includes a batch manager that allows for the automatic printing of reports. Reports can be attached to emails. Email notifications and reminders can be sent via email as well as appearing on users to do list.
Allows for the online submission of anonymous code enforcement complaints without prior registration as well as the generation of automated letters based on identified code violations.	Yes	Anonymous users can submit complaints. The system provides a robust correspondence module that includes a batch manager that allows for the automatic printing of reports. Reports can be attached to emails.
9. Public Online Application Submittal, Complaint and Inquiry Capabilities:		
The software will allow unregistered read-only queries of active and closed permits based on address.	Yes	Standard system functionality
The City would prefer a solution that also allows queries of a map to see active permits or code complaints.	Yes	Standard system functionality
Software will have the capability to allow online submittal of permit applications and related plan submissions, and code enforcement complaints.	Yes	Standard functionality. Agencies can designate application types as being available to anonymous users or only registered owners
10. Complete software documentation for support staff, users, and administrators:		
Access to user support documentation by all levels of users.	Yes	IPS provides easily accessible robust system help
11. Mobility/In-Field Usage:		
View, schedule, and modify inspections and record notes while in the field from laptops, iPads, and tablet devices.	Yes	IPS mobile inspector provides this functionality in a connected mode as well as automatic store and forward.
Allow pictures to be easily attached to inspection reports.	Yes	Standard functionality
Have the ability to quickly access all contact details for the owner, applicant, contractor or complainant as well as attached plans.	Yes	Standard functionality
Retrieve data by searching any parameter, including permit number, contractor, address, etc.	Yes	Any data element can be used in searches including data elements added during implementation. Data elements added subsequently can also be used as soon as they are added.
12. Capability to track planning and zoning applications:		
Software must include the ability to assign conditions to certain parcels such as a Historic District, Floodplain, etc.	Yes	Standard functionality. IPS provides robust inheritance rules for conditions. Automatically adding

		appropriate conditions to applications submitted subsequently.
13. Payment Processing:		
Software must directly integrate with a credit card processor and contain cash register functionality for processing of payments.	Yes	Standard Functionality. IPS integrates with most payment gateways. It never stores credit card information.
Payment processing must contain audit mechanism to track payment overrides and nuanced user rights.	Yes	Standard Functionality. This is managed through the in-application Audit Manager
Software must provide ability to limit users who can override payment structures.	Yes	User roles are defined via Access Control in the application
14. Audit Trails:		
Software must have internal controls within the solution which prevent unauthorized access to data and provide adequate audit trails	Yes	Standard Functionality. This is managed through the in-application Audit Manager

7. Licensing Model

Please describe your licensing models (e.g., concurrent user, named user, revenue, transaction volumes, data limits etc.)

Most all licenses that have been included are “named user” licenses with the exception of a few components that are licensed as “enterprise” licenses (see license definitions below). On the pricing document, we have designated the different license types.

For our customer facing portal (Rhythm for Civics) and customer services billing our pricing is slightly different. For Civics, we license based on annual number of searchable transactions in the system, i.e. the number of licenses, inspections, and permits that are tracked in the system. For customer billing, we license based on annual transactions processed in the system.

Enterprise	ET	Licensee and any legal entity (such as a corporation) that is majority owned or majority controlled, directly or indirectly, by Licensee. Allows unlimited use of the Component System within the licensed Business Entity.
Concurrent User	CCL	Quantity represents the maximum number of authorized users that may access the Component Systems at any given point in time, and each logon will be considered active during the entire logon period whether or not that user is interacting with the Component Systems at any point in time.
Employee	EM	A license is required for each active and inactive employee managed by the application.
End User	EU	"End User" means Licensee's current (i.e. non-terminated) full-time, part-time, or seasonal employees, consultants or contractors who either (i) use the Component System directly or (ii) whose records, schedules, or related data are processed by the Component System.

Named Users	NU	Allows access to the Component System up to the stated maximum number of individual named users, irrespective as to whether any such user is actively logged on to the Component Systems at a given point in time; The Licensee agrees to assign to each Named User a unique identification profile, it being agreed that to the extent Licensee uses generic user profiles as a means to access the Component System, each separate log-on accessing the Component System will be counted as a separate user.
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Our SaaS environment includes 2TB of data storage.

8. Data Ownership

Please describe data ownership model and accessibility to the data by the City.

The City retains ownership of all your data. Upon termination or expiration of hosting agreement, Infor will provide a secure FTP site and help the City download all data back on-site or to another Cloud provider.

9. Technical Requirements

All hardware requirements, system software, and application requirements must be listed.

We are proposing a SaaS solution, so the City does not have to provide the underlying hardware, operating or database software. End users are able to access the solution using a Web Browser. Below is a list of certified browsers for the proposed v11.1 IPS software.

- Internet Explorer 11
- Microsoft Edge 38.14393.0.0
- Google Chrome
- Firefox
- Safari 7.1.3 (on Mac)

Version numbers are not given for Chrome and Firefox because both of these will automatically update to the latest release.

The IPS Field Inspector app is supported on iOS, Android and Windows.

10. Hosting Information

Detail the network environment, data backup frequency and structure, and guaranteed percentage of uptime

Infor provides a fully hosted and fully managed solution. Infor leverages the services of Amazon Web Services (AWS) to provide the hosted solution. Infor solutions include a set of system, application, database, and infrastructure installation and support services. These include application and hardware administration, patch management, database and operating system management, performance monitoring, backup and recovery, and proactive health checks.

Infor relies on Amazon Web Services (AWS) to leverage sophisticated infrastructure, platform and services that can scale virtually infinitely to ensure optimal performance.

Backup and recovery is a part of Infor's SaaS standard offering.

For the proposed components, relational database servers employ synchronous or near-synchronous replication to duplicate data in multiple Availability Zones (AZ)'s to minimize or eliminate any transaction loss due to a system, data center, or AZ failure. The backup schedule is weekly, full 8 hours differential and 15-minute transactional log with 14 days of retention.

Information is moved electronically over encrypted circuits within the AWS network to other availability zones. All backups are encrypted with AES 256-bit encryption. We test, document and have a 3rd-party auditor attest to our backup and recovery processes and their success.

Standard uptime is 99.5%.

11. Implementation Services/Scope of Work

Provide a sample project management plan including reasonable target dates. This section must also outline key activities, work products and assumptions.

System implementation is a critical activity that sets the tone for the City's ongoing use of the Infor system. An onsite Infor implementation team will lead all project management, working in partnership with City staff to confirm that this project is delivered on time and within budget.

The TruePoint Implementation Strategy requires customers to play an active role in the implementation to ensure the solution ultimately meets their needs, as all TruePoint project tasks require input, prerequisite tasks, and extensive reviews from the customer.

Critical Success Factors

Project implementation will be a collaborative effort between the City and TruePoint.

Significant time will be spent to ensure City goals are met, as defined in the Statement of Work.

Infor implementation projects range in duration from six months to several years based upon

a variety of factors. Similar to implementation costs, implementation timeframes vary widely based upon size, scope, and complexity of the solution. The following list identifies the critical factors that typically have a significant impact on Infor implementations:

- **Dedicated City Participation** – TruePoint fully understands that City staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the Infor implementation project. However, it is critical that the City acknowledges that its staff must be actively involved throughout the entire duration of services as defined in the Project Plan. We will communicate insufficient participation of City and TruePoint resources through Project Status Reports with real and potential impacts to the project timeline. We will work with the project sponsors and project manager to determine appropriate team member involvement. This could range from full-time during early analysis meetings to part-time during the technical implementation phase.
- **Best Practice Experience** – TruePoint's Best Practice Experience, direct experience with hundreds of existing customers and domain experts informs working business processes including workflows, data structures, business logic, form and standard reports. These will be utilized as the baseline for the Solution Foundation phase of the implementation, which will decrease risk, expedite deployment and ensure a superior utilization of the Infor solution.
- **Knowledge Transfer** – While TruePoint cannot guarantee specific expertise for Agency staff because of participating in the project, we will make all reasonable efforts to transfer knowledge to the City. It is critical that City personnel participate in the analysis, configuration, testing and deployment of Infor to transfer knowledge to the City. Once Post Production assistance tasks are completed by TruePoint Services, the City assumes all day-to-day operations of Infor outside of the Support and Maintenance Agreement. The Service and Maintenance Agreement does not cover any City manipulation of implemented configuration, reports, interfaces and adapters.
- **Deliverable Acceptance Process** – Upon completion of each deliverable according to the acceptance criteria defined herein, TruePoint will provide the City with a Deliverable Acceptance Form to formalize acceptance and completion. This form is subsequently signed by the appropriate City contact, as defined in the Project Charter, and faxed/scanned/emailed or hand delivered to TruePoint. It is critical that reviews and approvals for each project deliverable are completed to confirm that TruePoint is meeting its expectations. Upon completion of each Deliverables Acceptance Form, TruePoint will proceed toward the next milestone. Deliverable review cycles, if extensive, can extend the length of a project significantly.
- **TruePoint's Implementation Strategy** – TruePoint's successful, proven, implementation Strategy is crucial to the project success. Infor's software and customer base is a niche market and, as such, the implementation Strategy may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to our implementation Strategy.
- **Documentation of Current Processes and Systems** – The level of available documentation can impact a project schedule considerably. Proper documentation can expedite the learning process for consultants, while limited documentation can result in additional phases (i.e., As-Is documentation, requirements validation and review).
- **Complexity of Scope and Requirements** including:

- Number of departments, divisions, user groups and/or agencies to which the software is deployed.
- Level of automation required and degree to which clients rely on inherent COTS configuration that maximizes out of the box functionality thereby reducing ongoing maintenance and support efforts.
- Conversion requirements – number and complexity of sources systems for data migration. System factors that lead to additional complexity include data cleansing requirements (if any) and/or converting legacy systems with limited and/or no documentation.
- Interfaces requirements – number and complexity of interfaces and specification of such, including but not limited to the frequency and type of data to be exchanged.
- Training requirements – including the number of business users that will require training and the schedule to do so in a manner that minimizes impact to operations.
- Testing requirements – including the time and effort available of City staff to define and accurately and adequately test the new functionality and data migrated.

While some or all of these factors influence the overall project schedule, it is critical to understand the business reasons for implementation, including the overall goals and objectives of our clients. Often our clients are working to implement mandated requirements within specified timeframes; other clients seek to increase efficiency, extend transparency and/or reduce overall spending on custom development efforts. The goals and objectives of our clients need to be considered in the development of an overall project schedule that reduces risk, maximizes benefit and works within the constraints of the agency.

Approach

Infor will develop a project management plan that provides details of our approach, Strategy, organization, communication strategy, risk mitigation strategy, staffing plan, training plan, development, transition and implementation plan, and collaboration between the City and the design team for program success. We will include each task, as specified in a subsequent Scope of Work, within the project management plan to support execution of it. At the program level, we will integrate the individual tasks and activities to form an overall project management plan and an integrated master schedule.

Deliverables

The following represents a list of the deliverables for this project.

Tangible Deliverables

The following is a list of deliverables that will be handed off to the City. All of these will require a signoff and acceptance by the City.

Deliverable	Description
Project Plan	This will be developed in Microsoft Project and updated on a regularly. An initial project plan has been included in this proposal for consideration but the first draft will be initiated during the kickoff meeting and agreed to and signed off by the entire project team. It is expected that the Project Plan will be a living document and updated regularly.
Project Charter	This document will include the project scope and objects, roles and responsibilities; along with the communication plan, escalation process and change order process. It will be drafted starting at the kick off meeting and agreed to and signed off by the entire project team.
Status Reports	This document represents the current state of the project and will be provided on an agreed upon interval throughout the project
IPS Design Documents	This document outlines how the Infor product will be developed for the City's business needs. Best practices will be used to maximize the product functionality. These documents will need to be signed off by the City before development on the product begins.
IPS Configuration	This is the configuration of the Infor product solely based on the signed off IPS Design Documents.
GIS Configuration Document	This document outlines how the GIS will be integrated with the Infor product. This document will need to be signed off by the City before configuration on the product begins.
GIS Configuration	This is the GIS configuration solely based off the GIS Configuration document.
Data Conversion Design Document	This is the document that outlines how the Hansen 7 data will be converted to the Infor database. This document will need to be signed off by the City before the conversion code is written.
Data Conversion	This is the converted data as defined from the Data Conversion Design Document.
City Interface Design Document	This is the document that outlines how the City data will interface with the Infor product. This document will need to be signed off by the City before development on interface begins.
City Interface	This is the developed interface based on the City Interface Design Document.
Report Design Documents	These are report design documents outlining the report layout and data mapping. Each design document will need to be signed off by the City before development on the report is started.

Reports	This is the report based on each report design document.
User Acceptance Test Case Documents	These test case documents are templates. These test case documents are used during User Acceptance Testing by the City to help focus testing.

Table 1 - List of Deliverables

Additional Deliverables

Not every deliverable comes in the form of a tangible deliverable. The following is a list of deliverables or actions that the TruePoint team will also deliver

Deliverable	Description
Kick Off Meeting	This meeting represents the start of this project. Many of the actions and tasks depend on this meeting. It is where we will start gathering our information and building our realistic plan forward.
Project Team Training	This training is to give the core team a base understanding of the Infor product. It provides them with some understanding of where we are going.
Testing Support	It is expected that the TruePoint team will support all testing, both on and off site.
Train the Trainer	This training is to provide training for the City's trainers who will train the end user community.
Go Live Support	This is onsite support for the Go Live week.

Table 2 - List of Deliverables

Initial Project Plan

12. Training

Provide an overview of proposed training, including options for on-site or training center services, end users, and system administrators. This section should also include an implementation and training plan including an estimated time-frame and deliverables for each stage of the project and training documentation provided.

Staff Training

Consistent and thorough training ensures that the Board personnel have the knowledge required to use Infor Public Sector to its greatest potential. Training plans are developed as part of the project's Statement of Work and will address the City's specific operational and administrative needs.

During project initiation, a draft training plan will be created based on the products purchased, the numbers and types of users, and the specific City requirements relative to training and development. Should needs change as the implementation progresses, this plan will be updated accordingly.

Implementation Training

The TruePoint team has planned multiple opportunities for Implementation Training for the City over the course of the project. There will be initial Product Overview and Basic Concepts training. There are training sprints planned to educate the project team in parallel with the needed configuration skills for each implementation sprint.

In addition, there is a vibrant Infor community where customers, partners and employees have continual access to computer based training topics, training documents and product documentation. There are also forums available at any time to discuss and resolve questions as they come up.

The project is staffed with senior consultants who will spend time explaining how the software works and will review the project deliverables so the City will understand how the solution was built, how they can build their parts of the solution and where documentation exists.

Train-the-Trainer Classes

We provide a variety of user and administrator training courses that are designed to orient, educate, and reinforce the core concepts behind the operation and management of Infor Public Sector. For this engagement the TruePoint team intends to use a "train the trainer" approach. This approach allows customers to use existing personnel to conduct user training classes during and after the project implementation. TruePoint and the City team will work together to identify the end user sessions needed. This will be done by identifying the daily processes and functional groups. Also, before scheduling the train-the-trainer sessions, the configuration of the processes should be in a state close to final in order to avoid any retraining efforts.

The methods used for a train-the-trainer delivery include first teaching the course to the designated instructors. Upon completion of that step the students are given assignments of sections of that course to study and teach to the other students within a specified timeframe. The potential instructors teach the others and the TruePoint instructor in the classroom. Peer and TruePoint instructor feedback and critique is given and that process is repeated for all the other students. Using this format, we can train these power-users in all aspects of the application from the perspective of a common user, a technical/administrative user, and a trainer.

User and Administrator Classroom Training

On-site training courses are available in a traditional classroom setting and are led by a TruePoint training professional. These courses can be generic or tailored to match the City's configuration. Class lengths vary between four hours and multiple days, and limit the number of attendees between 7 and 15 participants at a time. During classroom end user training, TruePoint's trainer will guide each user group through the screens, functions, and features that pertain to their job roles. These structured and formal sessions will provide hands-on experience using the actual system. Some exercises will be trainer-led, while others will allow users to experience the system independently and at their own pace.

Post Implementation Training from City's Trained Trainers

Once the system is in active use, there are a number of recommendations for the continuation of training for City staff. The following is a list of Infor sessions/classes that the City may find helpful:

- **Detailed Process Training** – Although process training was received as part of the pre-go-live training now that your users have been processing applications they will have questions and need for more detailed process training that will show them more about their daily work and improve efficiencies.
- **New Hire Training** – As new staff comes on you will need to give them the training the other staff received. In some cases it may be best to start with a basics class – navigation, searching, basic terminology and process. Follow this up with role-based process training covering what they do in the system and how they do it.
- **Refresher Training** – No matter how much training was completed prior to go-live the users will need some help remembering some of the basics and process. This can be done with documentation and/or a short session to take them through the system. This can also be combined with the Detailed Process Training above.
- **Super User Training** – This session are for those who may decide that instead of burdening the IT staff with all configuration or administrative changes a small group of “super users” can be trained to make some of those for their departments or groups. This would include form design changes, field text changes, adding or taking away drop-down values etc.
- **Administrative Training** – This session would be by request of the administrators who wish to learn more advanced topics – script writing, report writing and management etc. This could also be a request for refresher training from the IT perspective as well.

Over and above the standard training provided for each Infor Public Sector implementation, comprehensive product training can also be provided via Adobe Connect. Custom on-site classroom style training designed specifically for City may also be provided.

Infor also hosts regional educational seminars throughout the year and during the annual User Conference. Company newsletters and the Infor website keeps our clients up to date on new training offered, product information, and company news.

Infor also offers free webinars (online seminars) to current and prospective clients who wish to learn more about Infor products and their value.

Client Obligations for Power-User Training

- Select and prepare the power-users to participate in the training
- Ensure that selected power-users study the training materials prior to attending the training sessions
- Arrange time for power-users to attend training courses
- Select power-users that possess the following:
- A comprehensive understanding of the processes and business rules that drive City business processes
- Proficiency in computers, networks, and the use of the Internet and standard Internet browsers
- Conceptual knowledge of RDBMS-based applications
- Ability to devote time and effort into the daily management and maintenance of the Infor system
- Ability to clearly and concisely communicate any issues encountered to the Customer Resource Center
- Ability to provide one-on-one end user training as needed

City Training Responsibilities

TruePoint expects City staff will:

- Provide documentation and training of City processes as they will be at go live
- When appropriate, properly select and prepare the power-users who will be participating in the training and subsequently training End Users.
- Participate in knowledge transfer activities
- Arrange the time and qualified people for the training who are critical to the project success.
- Attend training sessions given by Infor trainers
- Provide suitable District facilities to accommodate various training classes.
- Users must be proficient in using PC's in a Windows environment.
- Users must be familiar with use of standard Internet browsers.

13. Support and Maintenance

Provide support services including provisions of regular updates and new releases, as well as technical consultation and support. Please include a timeline of recent updates and a description of the normal upgrade cycle.

You expect a support organization to resolve incidents, track response times, and provide software upgrades, patches, and service packs. At Infor, we believe that is not enough. We take support further because we believe it must be about more than reactive incident resolution and software upgrades.

With Infor Support, you receive support that's industry-tailored; where we understand that the speed and quality of the information we provide are critical to your organization. You get the optimum benefit from Infor, not only because of our deep industry knowledge, but also because we measure ourselves on how quickly we successfully address your issues.

With the Infor Support portal's consumer-grade user interface, you can set your viewing preferences so you receive information presented to you in a personalized way. You can access critical support resources, including software patches, service packs, updates, release notes, a comprehensive knowledge base, recorded briefings, and online communities 24 hours a day, 7 days a week, 365 days a year.

But don't believe us – let our clients speak. For the 10th straight year Infor was selected as a winner in the 2018 Confirmit ACE (Achievement in Customer Excellence) Awards. Infor Support was awarded this honor as part of a group of businesses that have demonstrated outstanding achievement in customer experience. Infor was also recognized for Best Use of Feedback Solutions, which acknowledges organizations that best use Confirmit solutions to capture, analyze, and act on the Voice of the Customer to improve the customer experience.



Meet the Infor Support Team

Real people

Whether your question is big or small, we're here to support you every step of the way.

Real answers

We don't believe in canned responses or "one-size-fits-all" support. When you have a question, we're listening. And when we have an answer, we make it specific to the issue you're facing right now.

Real support

We joined the Infor Support Team with backgrounds in engineering, development, and other technical fields. Some of us even helped develop the apps we support, so we understand them inside and out. We are all experts and we are all passionate about providing you with exceptional support.

We are vast	We are experienced	We are celebrated	We are worldwide	We are adored
1,600+	10.27	10	28	8.73
superstars	years	awards	countries	out of 10
Total number of Support staff around the global	Average experience in Support	We won the Confrimit Achievement in Customer Excellence Award ten years in a row.	The Infor Support team spans across the world with 60 offices in 28 countries	Average customer satisfaction score

Support Model Description

Infor offers support on a subscription basis or as a percentage of the license cost. There are 2 programs that are available so that you may choose what works best for your organization

Infor Premium Support: Provides support for an unlimited number of incidents, continuous online support through a portal that's available 24 x 7, telephone support, and priority queuing based on the severity of an incident.

Infor Premium Support has defined methodologies and key business systems that allow 24 x 7 interaction via the online Infor Support portal. Our extensive knowledge base system and recorded webinars are available at your convenience, in addition to extended critical incident support and live, interactive briefings.

Customer Success Plus Program: You may also choose the Customer Success Plus Program which has an assigned Customer Success Manager. The Customer Success Manager and the programs associated with this offering delivers dedicated, targeted support to help resolve issues and achieve user satisfaction with Infor's products and technology.

Infor Customer Success Plus Program delivers:

- **Assigned Customer Success Manager:** A Customer Success Manager is your key contact during onboarding and again after go-live. The CSM will provide service-related updates, provide access

to tools and online resources such as Concierge, Support portal, and CloudSuite portal.

The CSM provides a personalized, proactive service, they are your advocate at Infor, always working to help you optimize your usage of the Infor solutions by coordinating the right resources at the right time, knowing your needs, and bringing awareness of opportunities to explore.

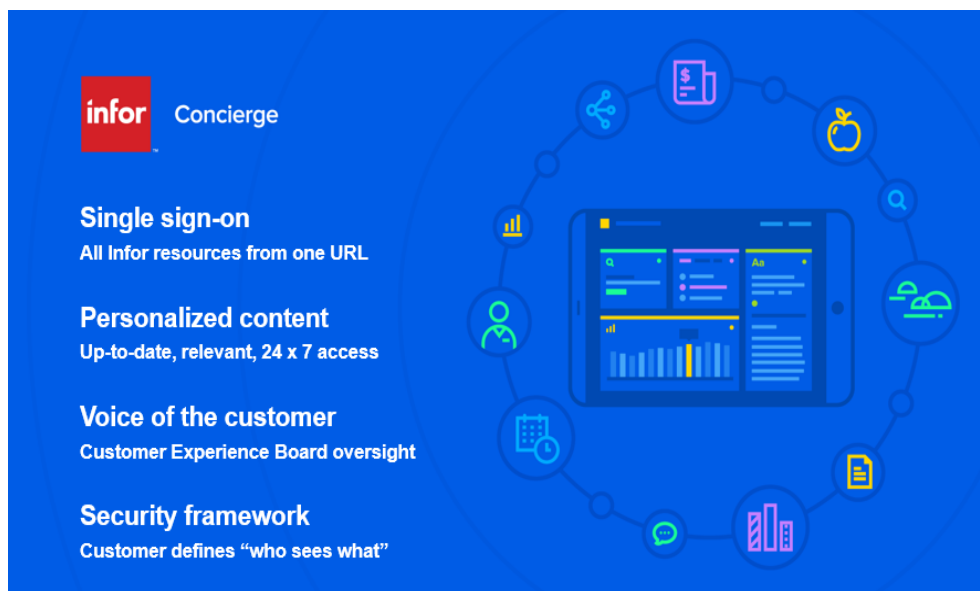
- **Support Activity Reviews:** Regular review meetings with your assigned Success Manager detailing your support incidents, including who logged each incident and a summary of all incidents opened and closed.
- **Early Adopter Program:** You receive priority consideration to participate in Infor beta programs or early adopter programs if the timing is appropriate, required effort is possible, and your and Infor's business and environment requirements are in alignment.
- **Access to Senior Level Support, Development and Cloud Operations Resources:** As appropriate, your Customer Success Manager will coordinate meetings with senior Infor support and development resources as needed.
- **Infor Education Incentives:** Customers receive discounts on Infor Education programs.
- **Inforum Incentives:** Inforum attendee incentive – buy one get one at 50% off, and join the Inforum Executive Session for Customer Success Plus members only.
- **Update Planning Assistance:** An Infor support resource and your assigned Customer Success Manager will conduct a pre-update planning call with you to discuss updates, review any known issues, and discuss any support considerations that you may wish to address.
- **Value Engineering Benchmarking:** Your current business performance is compared against industry and regional peers and evaluated on several key business performance indicators.
- **Opportunity to Serve on an Executive Advisory Board:** You receive priority to participate in Infor customer executive advisory boards. By participating on these boards, you receive special access to Infor product experts and executives, offering a direct channel to provide input on Infor's newest product offerings and business plans. The boards are designed to be collaborative, providing a unique opportunity to have an amplified voice regarding future Infor product direction. The boards also offer an opportunity to network and connect with other customer executives who are using Infor solutions.
- **Interactive Briefings:** WebEx sessions can be scheduled throughout the year, based on common topics of interest where customers will have the opportunity to ask questions from the experts. You can recommend topics and view previously recorded sessions, on demand, 24 x 7. There are many interactive and recorded briefings available which can be used as 'just-in-time' training vignettes, especially on enhanced functionality or more productive ways to use the features in your Infor solution.

Infor Concierge

Infor Concierge is a powerful, self-service resource that simplifies access to important sites, content, and resources within Infor. Infor Concierge is intuitive, with a modern look and feel and is available 24 x 7 for no additional fee to all customers who are on a current Infor Maintenance or Subscription contract.

Infor customers have one, streamlined location for answers to questions about their relationship with Infor. For example:

- Who is assigned to my organization?
- Is there a class for my product this month?
- Is there an upcoming marketing event that we should consider attending?
- What was our renewal invoice last year?
- Is there a new version of our software that is about to be released?
- What Infor products / subscriptions do we own?
- What education classes are coming up that are specific to our Infor solution?



Infor Concierge provides customers with access to updates on support incidents, quick views and voting on product enhancements, dates for recommended classes, information on product-specific education classes and webinars, and details on upgrade options for products owned.

In Summary

Choosing a technology partner is not a decision to be made lightly. The systems you invest in will help shape your business for years to come and the community that supports those investments has a major impact on your overall success. Infor Support brings decades of experience to supporting customers of all shapes and sizes and partnering with them to achieve their goals. Knowledge of our products and the industries we serve is unparalleled and you can count on our absolute commitment to making you successful. We're there where you need us, when you need us and will be for a long time to come.

14. Cost Proposal

Please provide costs for licensing, maintenance, training, and any additional services. The City would like to see first year costs as well as total cost for the first five years of agreement.

Software Licensing

Module	Quantity	License Type
Infor Public Sector (IPS) CDR	55	Named User
Infor Birst Reporting	5 Professional/Analyst; 50 lite/ casual	Named User
IPS GeoAdministrator	2	Named User
IPS CDR Billing	25,000	Annual Transactions
IPS Cashiering	10	Named User
IPS Mobile Inspector	20	Named User
Rhythm for Civics	30,000	Annual Searchable Transactions

- **Year one total license, support, and maintenance costs for the above modules and user counts= \$111,744.48.**
- **Years two and three license, support, and maintenance costs= \$94,144.48.**
- **Year four: \$97,000**
- **Year five: \$99,912**
- **Total 5-year costs for license, support, and maintenance= \$496,945**

Services Pricing

Cloud Implementation - Multi-tenant

Task	Hours	Rate	Cost
Project Management	300	\$185.00	\$55,500.00
Back Office Business Analysis (BA) Phase	600	\$175.00	\$105,000.00
Rhythm Business Analysis (BA) Phase	240	\$175.00	\$42,000.00
Infor Public Sector (IPS) Configuration	600	\$175.00	\$105,000.00
Rhythm Configuration	240	\$175.00	\$42,000.00
Data Conversion - One Solution Permits/Licensing	200	\$175.00	\$35,000.00
Data Conversion - Access DB - Code Enforcement	80	\$175.00	\$14,000.00
Integration - GIS	120	\$175.00	\$21,000.00
Integration - Tyler (Munis)	200	\$175.00	\$35,000.00
User Acceptance Testing	100	\$175.00	\$17,500.00
Report Development	200	\$175.00	\$35,000.00
End user Training and documentation	200	\$175.00	\$35,000.00
Mobile	80	\$175.00	\$14,000.00
Go Live	120	\$175.00	\$21,000.00
Expenses (10 onsite trips expected)			\$39,000.00
Total	3280		\$616,000.00

15. Customer Implementation Responsibilities

Please describe and/or provide a list of the typical customers' implementation responsibilities.

When staffing the implementation, it is important to consider available resources, internal skills, competing priorities, and project timing. The table below represents Infor's recommended agency-side staffing to support this implementation. This guideline assumes an apprenticeship approach to the implementation. Infor's Professional Services team will execute project tasks while also transferring system maintenance and configuration knowledge to City staff.

City Resources	Responsibilities
Project Sponsor	<ul style="list-style-type: none"> • Ultimate responsibility for the success of the project • Creating an environment that promotes project buy-in • Driving the project through all levels of the City • High-level oversight throughout the duration of the project • Serving as the primary escalation point to address project issues in a timely manner
Project Manager	<ul style="list-style-type: none"> • Overall administration, coordination, communication, and decision-making associated with the implementation • Planning, scheduling, coordinating and tracking the implementation with Infor and within the City • Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track
Division/Departmental Business Leads	<p>A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity for that group. These critical appointments may well determine the success of the implementation for their respective areas. Responsibilities include:</p> <ul style="list-style-type: none"> • Attending requirements workshop sessions • Willing and able to gather data and make decisions about business processes • Assist in the creation of specifications for reports, interfaces & conversions • Review and test the system configuration, reports, conversion, interfaces • Participating in the implementation of the Infor solution
Division/Departmental Subject Matter Expert (SME)	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Being trained on the Infor system at a System Administration level

	<ul style="list-style-type: none"> • Being fully engaged in the Business Analysis and system configuration activities • Assist internal efforts towards the creation of reports, interfaces & conversions • Assist in the review and testing of the system • Actively participate in the full implementation of the Infor solution •
Technical Lead	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Primary responsibility for the technical environment during the software implementation • Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards • Work with Infor technical personnel during implementation • Maintain test and production databases • Perform day-to-day maintenance of the system and install maintenance releases • Act as the primary technical resource for troubleshooting problems • Establish and maintain backup, archival, and other customary maintenance and housekeeping activities •

Table 3 - Recommended City Staffing

16. Example Contract

Please provide example/boilerplate contract(s) that will be used to negotiate the proposed solution.

17. Additional Information

Please provide any other information you feel is important for consideration in the City's evaluation of proposals.

Infor Delivers Solutions that are Engaging and Transformative

We design, develop, market, sell, implement and support enterprise business software applications that provide our customers with highly functional and technically advanced products. We believe we offer a compelling choice to many enterprise software customers and that we have developed competitive advantages in serving our targeted industries. We offer both vertical-specific and horizontal software products. We also believe we offer a number of flexible deployment options for customers, allowing them to run our software on-premise, on a hosted basis or in the cloud using the same product.

Infor creates beautiful software experiences, in the cloud, with embedded industry expertise and machine learning to modernize industries. We are entrepreneurs who are students of industry with a passion for transforming companies with technology and unconstrained thinking.

Infor has the cloud architecture, industry domain, scientists, design thinking, and engineering scale to create a new genre of applications that are engaging, predictive, immersive, and transformative.

Appendix 1 – Equal Business Opportunity Plan

CITY OF JACKSON, MISSISSIPPI EQUAL BUSINESS OPPORTUNITY PLAN APPLICATION

- I. CompanyName: TruePoint Solutions
Address: 3262 Penryn Rd., Suite 100-B,
City: Loomis State: CA ZIP Code: 95650
Telephone: (916) 259-1293
E-mail: mcohagan@truepointsolutions.com
Company Name: TruePoint Solutions
- II. Bid Name and Number: Permitting, Licensing, and Enforcement Software and Implementation Services, RFP: 91700612
- III. PROPOSED MINORITY AND/OR FEMALE SUBCONTRACTORS: (SEE ATTACHMENTS)
If a prime contractor utilizes one or more suppliers to satisfy its EBO commitment, all MBE or FBE supplier participation will be credited in accordance to Section VI of the EBO Executive Order No. 2014-3.
- IV. Total Bid Amount: \$ 727,744.48
- V. WAIVER REQUESTED (If you fail to meet either or all of the EBO Participation Goals, check this box and follow the directions below to provide the required *WAIVER STATEMENT*. The “Waiver Statement” should be submitted on company letterhead to the EBO Officer.)
- * The bidder/offeror shall provide the following as evidence of its good faith efforts and will be evaluated on the same:
- a. Copies of written notification to MBEs and FBEs soliciting their participation as a subcontractor.
 - b. Evidence of efforts made to divide the work into economically feasible units in order to increase the likelihood of meeting the EBO participation goals.
 - c. Evidence of efforts made to negotiate with MBEs and/or FBE, including, at a minimum:

1. The names, addresses, and telephone numbers of the MBE and FBEs who were contacted.
2. A description of the information provided to MBEs and FBEs regarding the plans and specifications for portions of the work to be performed.
3. A statement of reasons why additional agreements with MBEs and FBEs, if needed to meet the stated goals, were not reached.
4. Evidence of efforts made to assist the MBEs and FBEs contacted who need assistance in obtaining bonding and insurance which the bidder or offeror requires.
5. For each MBE and FBE contacted which the bidder or offeror considered to be not qualified, include a written statement of the reasons for the bidder's or offeror's conclusion.
6. Written proposals solicited from all MBEs and FBEs seeking subcontract work with Prime Contractors at the time of the bidding.
7. A statement with supporting documentation and affidavits indicating whether the offeror has used MBEs and/or FBEs as joint venture partners or subcontractors in past or present private sector contracts in Jackson.

**If you are unable to locate an MBE/FBE, please contact the Business Development Division at (601) 960-1856.*

VI. Minority and Female Business Enterprise Actual Participation for this Bid/Offer/Quote:

(* Please list your MBE and FBE Project Participation percentages (%) in the Table below.)

PROCUREMENT CATEGORY	Asian (ABE)	African-American (AABE)	Hispanic (HBE)	Native American (NABE)	Female (FBE)
A/E & Professional Services	n/a	n/a	n/a	n/a	n/a
Construction	n/a	n/a	n/a	n/a	n/a
Goods & Non-Professional Services	n/a	n/a	n/a	n/a	n/a

VII. REPLACEMENT OF MBE/FBE

If an MBE or FBE is not performing satisfactorily, it is the responsibility of the Prime Contractor to notify the EBO Office immediately both in writing and by phone. All MBE/FBE replacements must be approved by the Equal Business Opportunity Review Committee (EBORC). If these steps are not taken this will result in penalties as outlined in Section XI of the EBO Executive Order No. 2015-3

VIII. CERTIFICATION

I certify, under penalties of perjury, that the information contained in this Equal Business Opportunity Plan Application is true and accurate to the best of my knowledge, and that my company fully intends to utilize all MBEs and FBEs listed if awarded the proposed project and/or service and abide by all EBO guidelines.



Authorized Signature and Title

Date

PRINT "AUTHORIZED" NAME HERE: Matthew R. Cohagan

EQUAL BUSINESS OPPORTUNITY PLAN APPLICATION -- ATTACHMENT
Proposed Minority/Female Business Enterprise Firms

Company
Name: _____ Type Trade/Business: _____

Address: _____

City, State, ZIP: _____

Contact Person: _____

Telephone Number: _____

Type Minority Business (MBE/FBE):

_____ Female (FBE)

_____ African-American (AABE)

_____ Asian (ABE)

_____ Hispanic (HBE)

_____ Native American (NABE)

Type Minority Business (MBE/FBE) Involvement:

_____ Subcontractor

_____ Supplier

_____ Joint Venture

_____ Mentor-Protégé

Type Work or Service to be Performed: _____

Scope of Work to be Performed: _____

Dollar Value of the Work to be Performed by the Minority Business (MBE and/or FBE): \$ _____ n/a

Percentage of MBE and/or FBE Participation: _____ %

Company
Name: _____ Type Trade/Business: _____

Address: _____

City, State, ZIP: _____

Contact Person: _____

Telephone Number: _____

Type Minority Business (MBE/FBE):

_____ Female (FBE)

_____ African-American (AABE)

_____ Asian (ABE)

_____ Hispanic (HBE)

_____ Native American (NABE)

Type Minority Business (MBE/FBE) Involvement:

_____ Subcontractor

_____ Supplier

_____ Joint Venture

_____ Mentor-Protégé

Type Work or Service to be Performed: _____

Scope of Work to be Performed: _____

Dollar Value of the Work to Be Performed by the Minority Business (MBE and/or FBE): \$ n/a

Percentage of MBE and/or FBE Participation: _____ %

Company Name: _____ Type Trade/Business: _____

Address: _____

City, State, ZIP: _____

Contact Person: _____

Telephone Number: _____

Type Minority Business (MBE/FBE) Involvement:

_____ Subcontractor _____ Supplier
_____ Joint Venture _____ Mentor-Protégé

Type Work or Service to be Performed: _____

Scope of Work to be Performed: _____

Dollar Value of the Work to Be Performed by the Minority Business (MBE and/or FBE): \$ n/a

Percentage of MBE and/or FBE Participation: _____ %

February 5, 2019

Business Development Division
The City of Jackson
219 South President Street 1st Floor
Jackson MS 39201

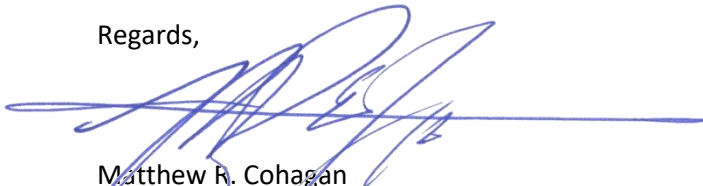
RE: Attachment – Application for Waiver – Equal Business Opportunity Plan

To whom it may concern:

As a California Certified Small Business Enterprise, TruePoint Solutions appreciates the importance of supporting the City of Jacksonville's efforts to provide equal opportunity. We have included the present attachment to the City's EBO forms because it is our feeling that due to the nature of the work, service and product contracted, additional subcontracting with CSBs, MBEs or FBEs is impossible or impractical.

The TruePoint Solutions bid containing these EBO schedules is being submitted to obtain professional services work in which the majority of our employees specialize. Based on TruePoint's extensive experience in this area, the nature of this engagement would *not require staffing levels greater than an occasional one or two onsite project resources*. Furthermore, most of the proposed work would be accomplished remotely or via Web collaboration, and would not justify the use of subcontractors. To be clear, it is our sincere belief that staffing needs would not rise to a level which would reasonably allow for the use of sub-consultants of the appropriate skill set and desired task type.

Regards,



Matthew R. Cohagan
TruePoint Solutions
3262 Penryn Rd.
Suite 100-B
Loomis, CA 95650
(916) 259-1293 office
(916) 256-1975 fax

Appendix 2 – TruePoint Resumes

ANGELICA BRUBAKER

IMPLEMENTATION CONSULTANT

PROFILE

Angelica is a Solutions oriented Business Analyst and possesses a unique combination of skills, including business analysis, user acceptance testing and applications development. Her skills also include: Requirement tracing, Business process improvement, Functional requirements and Requirements gathering.

PROFESSIONAL EXPERIENCE:

TruePoint Solutions, LLC

Loomis, CA

Business Analyst

January 2017 – present

Works on government specific projects using Infor Software.

- Project plan management using Microsoft Project
- Project document management using Microsoft Sharepoint
- Issue log management and escalation
- Status Reporting
- Change order management
- Project workspace management
- Resource management
- Executive project oversight and quality assurance

Aetna (Coventry Health Care)

Tucson, AZ

Associate Business Analyst

January 2009 – April 2011

- Made reasonable procedure exceptions to accommodate unusual client requests.
- Provided accurate and appropriate information in response to customer inquiries.
- Addressed client service inquiries in a timely fashion.
- Worked with upper management to ensure appropriate changes were made to improve client satisfaction
- Properly directed inbound calls in phone queues to improve call flow.
- Trained new team members.
- Managed a specific client's Escalation Queue and participate in meetings with leadership and the client.
- Performed Quality checks on submissions prior to escalating due to complexity of client's requirements.
- Peer to Peer coaching and provide feedback to management on a daily report.

Online Self Storage

Tucson, AZ

Telecom Administrator

May 2007 – November 2008

- Installed, maintained and supported SIP applications.
- Verified work order information and receipt of all necessary equipment
- Provided support for end users.
- Ordered equipment and services for voice, data and cabling.
- Oversee internal telecommunications system for organization with 100 employees for both Tucson and Cleveland centers.
- Recorded IVT messages for clients

Intuit, Inc

Tucson, AZ

Business Analyst

June 1998 – December 2006

- Provided Production Support for Siebel 7.5, Oracle 11i, and Witness.
- Ensured Processes and Tools were in place for technical support agents when new Products/Offerings were being created
- User Acceptance Testing and support for Siebel releases.
- Participated in JAR/JAD sessions, and Key process change identification and documentation.
- Business requirements gathering and documentation.
- Effective presentations (verbal and written) appropriate for project teams and business leaders.
- Data analysis documentation for a single/multiple product line(s), across major functional areas (technical support, sales, and service), or business process (service delivery, knowledge management, contact management).

EDUCATION

Pima Community College 1993-1995

University of Arizona 1991-1992

Fundamentals of Health Insurance, Part A (Basics of Health Insurance) October 2010 through AHIP

CALEB R. HARSHBARGER

PROFILE

Caleb Harshbarger is a technical implementation consultant focused on programming, database management and user interface design. His programming language experience includes PL/SQL, C++, C#, Java, JavaScript, Visual Basic, XML, HTML, CSS, PHP, and Perl. Caleb has worked with Oracle, Access and MySQL Server.

PROFESSIONAL EXPERIENCE

TruePoint Solutions

Technical Consultant

June 2010 - Present

As a Technical Consultant on various projects Caleb has the following responsibilities:

- Create Report Specification and Reports in Crystal or SSRS
- Develop strategies for converting data from legacy systems
- Create data conversion documents and data conversion programs
- Create interfaces to 3rd party data
- Create JAVA scripting (Event Scripts) to automate business processes
- Installation of various products on client servers

Engagements include:

- Sac County – An Infor implementation. Primary function as an interface developer, business analysis, data conversion expert.
- Calvert County - An Infor implementation. Support business analysts writing formulas.
- Monterey – An Infor implementation. Support business analysts writing formulas.
- Boston, Department of Building – An Accela Automation implementation. Functioned as lead Event Script developer, managing a team of 10+ programmers
- New York City, Department of Building – An Accela automation implementation, Primary function as an expert Accela Resource and expert in Event Script design and development.
- New York City, Department of Consumer Affairs – An Accela automation implementation. Function as expert resource in Accela Event Script design and development.
- San Diego County – An Accela automation implementation migrating from Kiva to Accela Automation. Primary function is as an expert in Event Script design and development. Other areas including Business Analysis, Conversion, ACA, AMO, APO, Interfaces.
- El Paso – An Accela Automation implementation including AA Licensing
- Pinal County – An Accela Automation implementation including all Accela components

EDUCATION

University of Nebraska - Lincoln May 2003

Bachelor of Science - Computer Science, Minor in Business

Certified Scrum Master, 2016

Certified Scrum Developer, 2016

DANIEL GROFF

TECHNICAL CONSULTANT

PROFILE

Danny Groff is a technical Implementation consultant focused on programming, database management and user interface design. He has Certifications in the following areas; CIW Web Design Specialist, CIW Database Design Specialist, CIW JavaScript Specialist, CIW Perl Specialist, CompTIA Project+ and Oracle Java SE 6 Programmer.

PROFESSIONAL EXPERIENCE

TruePoint Solutions

Technical Consultant

November 2016-Present

As a Technical Consultant on various projects, Danny has the following responsibilities:

- Create Report Specification and Reports in Crystal or SSRS
- Develop strategies for converting data from legacy systems
- Create data conversion documents and data conversion programs
- Create interfaces to 3rd party data
- Create JAVA scripting (Event Scripts) to automate business process
- Installation of various products on client servers

Hughes Federal Credit Union

Database Specialist

Sept 2012 – Nov 2016

Tucson, AZ

- Develop reports using SQL, SSIS, Crystal Reports, Java, C# and PHP
- Maintain company intranet
- Field calls on the company help desk

The Innova Group

Developer – VBA; Database Specialist

Feb 2011 – Sept 2011

Tucson, AZ

- Develop an Access database with forms, reports and modules that helped with scheduling and predicting costs, utilizing code SQL statements and VBA.

CDEX, Inc

Developer/IT Administrator

July 2010 – Dec 2010

Tucson, AZ

- Manufacture ValiMed units to help hospital Pharmacies validate IV medication
- Program features for proprietary software and fix bugs utilizing Microsoft Visual Basic
- Develop other programs to aid in setting up the ValiMed units (VB6 and .Net)
- Generate spectral signatures for medications based on data gathered from the ValiMed
- Initiated and completed a program in MatLab to compare signatures with the FFT and Spectra data gathered for each substance during the signature generation process
- Maintain office network with Windows Server 2008 and XP workstations
- Maintain office email system

- Maintain company website utilizing Macromedia DreamWeaver
- Troubleshoot and repair company computers
- Work with clients to determine the statistical analysis of their use of the proprietary software

Demott Business Systems

Lead Technician

Feb 2001 – Feb 2003

Tucson, AZ

- Diagnose and repair computers, fax machines, printers and copiers
- Assist other technicians if needed
- Assign tasks to other technicians
- Network Administrator on NT network
- Lotus Notes Administrator
- MS Exchange Administrator

DIYonline.com

Lead Design Technician

May 1999 – July 2007

Tucson, AZ

- Develop Access databases and some programming in Visual Basic using Access 97,2000 and VB5,6
- Run landscape designs sent by customers through software written to design irrigation systems
- Debug software
- Test website
- General customer service
- Track bugs and designs
- Build new code using Visual C++

EDUCATION

Western Governors University, Salt Lake City, UT

Graduated in 2014

Course study for Bachelor of Science in Information Technology with specialization in software

H.T. Kerr Skill Center, Titusville, PA

Graduated in 1986

Course study for Microcomputer Technology and Database Management; Boolean Algebra, Digital Circuit Design

Eastland J.V.C., Groveport, OH

Graduated in 1980

Courses, Analog Electronics, Analog Circuit Design; Related Arithmetic

ERNEST PHILLIPS

TECHNICAL CONSULTANT

PROFILE

Ernie is a technical implementation consultant focused on programming, database management and user interface design. His Software Experience includes Microsoft Visual Studio 2008-2010-2012-2013-2015, Microsoft Office Suite 2003-2007-2010-2012-2014, Adobe Master Suites, CS-CS5, Cisco VPN Clients, AutoCAD 2003-2012, VMPlayer, VMWare Client, VSphere, MySQL, Report Builder, Sql Developer, Sql Management Studio, EDNA, Siems Scada System, GE Scada System, CERNER and Synergy SIS. Ernie's programming experience includes C#, VB.NET, CSS, PLSQL, MS-SQL, ASP.NET MVC, Java Script, PHP, HTML5 and Agile Methodologies.

PROFESSIONAL EXPERIENCE

TruePoint Solutions

November 2016 – Present

Programmer/It Analyst

As a Technical Consultant on various projects, Ernie has the following responsibilities:

- Create Report Specification and Reports in Crystal or SSRS
- Develop strategies for converting data from legacy systems
- Create data conversion documents and data conversion programs
- Create interfaces to 3rd party data
- Create JAVA scripting (Event Scripts) to automate business processes
- Installation of various products on client servers

Hye Tech Network & Security Solutions, LLC

Senior Software Developer

July 2015 – October 2016

Tucson, AZ

- Asses and train employees for client
- Developed training the team in multiple C#, MS-Sql, SSRS and Visual Studio Lessons
- Implemented a TFS Server and built local development environments for their new SIS and held trainings to expand employee's technical knowledge.
- Introduced organization to SCRUM methodologies and Agile principles.
- Maintained and assisted in migration from a home grown Student Information system to an off the shelf SIS system called Synergy.
- Built C# Web Forms application for clients
- Assisted management with technical decisions on which way to proceed when there were gaps in a project.

Ascension Information Services

Senior Solutions Development Analyst

April 2015 – August 2015

Tucson, AZ

- Designed, modified and maintained a Find A Doctor system for Carondelet Health Network. It was made with MS-SQL backend and C# Web Forms.
- Project lead for Class Registration system.
- Created a mobile responsive plan for public facing website
- Modified and maintained public facing Carondelet.org Dot Net Nuke website, internal share point sites, Internal Physician Portal website made with VB.Net Forms

- Implemented SSRS report server to create centralized report storage and reusable data sets and reports that are consumed by different resources.
- SSRS administration and maintain all report development and documentation.

Southwest Transmission Cooperative

Software Developer

July 2012 – March 2014

Benson, AZ

- Created and maintained emergency contingency page and Operations/Change Logging web page and databases.
- Maintain custom Complex Billing software and data transfer processes with Oracle, Microsoft, and access databases.
- Implemented SSRS report server to create centralized report storage
- SSRS administration and maintain all report development
- Created cross browser compatible SSRS report viewing website
- Converted Access and Excel based billing and analysis documents into C# programs with an Oracle database.
- Created and converted the companies Billing Unit System from a VB.Net one click application to a C# website.
- Designed and replaced legacy MS Basic application
- Consolidated dozens of automated scheduled tasks and Oracle scheduled jobs to a maintainable driver
- Designed and modified data transfer processes during our company's replacement of the Siemens SCADA system to a GE system
- Created and maintain automated and web distribution of EMS data and Billing Reports.
- System analysis on calculation changes and data source changes.
- Responsible for identifying business needs and shortfalls with current technology processes

Madden Media

IT Specialist

2009-7/2012

Tucson, AZ

- Implemented IT standards in documenting and customer service standards
- In charge of creating a repository of training documentations and training sessions that are accessible by a shared folder.
- Repaired end users problems off site and in the building
- Supported over 20 different types of cell phones running android, iOS, and blackberry devices

System Administrator

- Implement a Disaster Recovery Plan with disk to disk to tape backups with Retrospect
- Created and implemented systems build procedure using WDS and SMS
- Ran the companies IT department of 100 employees and 37 servers
- Maintained Windows Server 2008 R2 Enterprise and Windows Server 2003 Enterprise hardware and software maintenance.
- Communicating with all vendors for IT needs and company needs.
- Maintained Active Directory, DNS and DHCP.
- Managed SQL Server 2008 backups and user access.

- Planned and transitioned over 20 Mac users to PC's and created training for smooth transition.
- Reviewed and cut cost for phone plans with AT&T and Verizon for a total of 10% reduction

Network Administrator

- Monitoring network traffic and bandwidth usage
- Updated the networks site to site communications
- Maintained IP phone network and IP system and hardware updates

Programming

- Created inventory system using ASP.NET MVC with a SQL Server Data Base
- Created power shell scripts to create new employees accounts and out profile settings.

EDUCATION

Associates of the Arts in Systems Administration/Networking, Small Computer Systems Administrator (Programming)
Pima Community College 2009-2011

JEFFREY SIMKOWSKI

PROFILE

Jeff Simkowski is a technical implementation consultant focused on programming, database management and user interface design. His programming language experience includes SQL, XML, ObjectPAL, C, C++, C#, Ruby, Python, Excel VBA, HTML5, CSS3, Javascript, Visual BASIC, DOS batch scripting and Auto-Hotkey. Jeff is a solutions-based software developer/project manager/validation automation engineer with over 15 years of experience in the high technology industry, including 9 years in the database creation/support field. His experience includes Project Management, Software Development, Quality Assurance, Validation Automation, debug, software versioning, peer code review, Agile/Scrum/Kanban methodologies, data analysis, requirements/resource planning, validation test planning/auditing, documentation creation, data reporting, presentation and training/mentoring

PROFESSIONAL EXPERIENCE

TruePoint Solutions

Technical Consultant

July 2016 - Present

As a Technical Consultant on various projects Jeff has the following responsibilities:

- Create Report Specification and Reports in Crystal or SSRS
- Develop strategies for converting data from legacy systems
- Create data conversion documents and data conversion programs
- Create interfaces to 3rd party data
- Create JAVA scripting (Event Scripts) to automate business processes
- Installation of various products on client's servers

Intel Corporation

Folsom, CA

Graphics Software Engineer/SSD Validation Engineer

2007 - 2016

Product lead for prior 6 major Intel platform releases for graphics driver software and SSD hardware. Responsible for Project Management, where he owned all aspects of driver validation from requirements gathering to public release, as well as Software Development/Validation Automation Lead performing test code/framework development, debug, manual to auto test conversions, documentation creation and training/mentoring.

Responsibilities included:

- Prepared project validation requirements and resource planning, created test plans / frameworks / grids
- Led development efforts to automate existing manual testing for both graphics driver validation and power measurement data collection
- Created documentation and web-based training for test execution for personnel and peers
- Was part of an internal Intel team which submitted a patent for review

EDUCATION

Continuing education at Folsom Lake College, working towards Associates Degree

JOE TILLMAN

PROFILE

Joe is a highly motivated, creative and accomplished Technical Project Manager with 14 years of increasingly responsible experience. Time and again, Joe has demonstrated his professional acumen and grit in capacities including Custom Software Development, Workflow Process Automation, Systems Engineering, System Migrations/Integrations, and Enterprise Wide Implementations. Joe also has in-depth experience with:

- Requirements Analysis
- Project Scheduling
- Testing/QA/Rollout/Support
- Source Code Management
- Database Design (RDBMS)
- User Training
- Client Relations & Presentations
- Business & IT Planning
- Vendor Management
- Problem and Change Management

PROFESSIONAL EXPERIENCE

TruePoint Solutions

Loomis, CA

Feb 2015 – Present

Project Manager

As the project manager on large scale projects Joe has the following responsibilities:

- Project plan management using Microsoft Project
- Project document management using Microsoft Sharepoint
- Issue log management and escalation
- Status reporting
- Change order management
- Project workspace management
- Resource management
- Executive project oversight and quality assurance

Franklin Templeton Investments – Global Operations

Technical Project Manager

2012 – Present.

- Managed enterprise wide project to deploy Foglight Application Performance Management (APM) solution to all business critical applications. Liaisoned with business and IT, including developers, Information Security, Engineering and Networking to install end to end monitoring for applications and supporting infrastructure. Worldwide deployment on Oracle and SQL Server Databases, Windows, Linux, Solaris and AIX OS, Network infrastructure including Network Taps, Web Servers .NET, Jboss, Apache, Weblogic, Tomcat, Oracle App and WebSphere and end user synthetic transaction recorders.

Software Engineer 2008 – 2011

- Designed developed and maintained Project Management Office solution to record and track all enterprise project statuses, approvals and funding sources.
- Designed developed and maintained Automated Privileged ID solution to allow privileged account access across all hardware platforms. Allows application development team staff to obtain target server login credentials for a 24hr period after automated validation of user access to target server and open problem or change ticket. Creates auditable records of all ID checkouts.

- Developed auditable automated access validation system to facilitate manager verification of team member access to Source Code Repositories.
- Created automated process for requesting access to all Source Code Management tools.

Sr. IT Business Systems Analyst

Software Configuration and Change Management 2006 – 2008

- Managed Source Code Repositories and code deployments for all Tier1 applications.
- Provided support for Subversion, TortoiseSVN, Serena Dimensions, Version Manager, Mover and Builder and Eclipse IDE

Hansen Information Technology

Rancho Cordova, CA

2001 – 2006

Project Manager 2002 - 2006

- Managed deployment of mobile solution for City of Chicago Building Inspectors. Managed all phases of project, from gathering end user requirements to working with hardware supplier, cellular network providers and software developers. Provided classroom and in the field training to users upon completion.
- Managed deployment of Chicago Fire Department, Fire Prevention Inspection solution.
- Managed deployment of Chicago Health Department, Restaurant Inspection solution.

Software Configuration Specialist 2001 -2002

- Performed Requirements Analysis, Design and Configuration for Inspection software for City of Chicago Elevator, Iron and Demolition Departments of Permitting and Inspections.
- Performed Data Migrations from legacy systems into Oracle database back end of inspection software.

University of California, Davis

King School of Law

2000 -2001

Data Analyst

Performed data migrations and integrations from legacy DB2 and Mainframe data sources into new SQL Server database.

EDUCATION

- ***ITIL Certified – 2009***

- ***University of California Davis – 2000***

Oracle Database Design Development and Management Certificate

- ***California State University Sacramento – 1989***

Bachelor of Science Business Administration/Finance

Certified Scrum Master, 2016

Certified Scrum Developer, 2016

NATHAN MORGAN

PROFILE

Nathan has several years of project management, developing and implementing strategic goals in cross functional teams. He comes to us with SAP business Intelligence super user performing, report building and identifying issues.

PROFESSIONAL EXPERIENCE:

TruePoint Solutions, LLC

Loomis, CA

Business Analyst

January 2017 – Current

Works on government specific projects using Infor Software.

- Project plan management using Microsoft Project
- Project Document management using Microsoft Sharepoint
- Status Reporting
- Change order management
- Project workspace management
- Resource management
- Executive project oversight and quality assurance

Chamberlain

Tucson, AZ

Business Analyst

January 2008 – January 2016

- Project management of cost reduction, proficiency, and enhanced customer experience initiatives.
- Research business needs and solutions, analyze data, and develop metrics.
- GAP analysis of systems and data to provide short and long term solutions.
- Project management of SAP initiatives striving to improve customer experience.
- Supervised outreach customer satisfaction program.
- SAP blue printing and integration testing, implementing a successful SAP launch.
- Leveraging SAP Business Intelligence building reports based around business metrics.
- Data analytics to manage day-to-day business based on historical information, trends and metrics.

Flagstar Bank and Nova Home Loans

Tucson, AZ

Loan Processor, Program Coordinator, Assistant Loan Officer

2002 – 2007

- Accepted loan applications and researched loan programs to fit client's needs.
- Gathered required documentation and information from clients.

- Prepared loan files based on requirements and submitted to underwriting for approval.
- Coordinated loans with parties such as realtors, title companies, inspectors and internal departments.

EDUCATION

Bachelor of Business in Management with Honors

University of Phoenix, 3.96 GPA

PAULA WHITEMORE MONTOYA

PROJECT DIRECTOR

PROFILE

During Paula's 19 year career in the government sector, she has had the opportunity to fulfill many project roles: Project Director, Project Manager, Technical Lead/Developer and Data Conversion Manager/Developer. Her technical skills have allowed her to have highly successful project implementations.

PROFESSIONAL EXPERIENCE:

TruePoint Solutions, LLC

Loomis, CA

2006 – Current

Partner Solutions Director

Manages and works on government specific projects with multiple software products, including Infor, Lucity, and other software providers, as well as with TruePoint Solution's software.

Responsibilities include:

- Act as the project manager, business analyst, configuration specialist, report developer, programmer and/or quality assurance specialist in solo or team projects.
- Manage Project team
- Develop conversion document, programs and test plans
- Develop interface document, programs and test plans
- Develop scripting specification, programs and test plans
- Develop, maintain and implement project timelines and deliverables
- Maintain system life cycle procedures and documentation
- Manage end user support procedures and productivity

Notable Projects:

- | | |
|--|---|
| • Calvert County, MD – Infor CDR | • San Marcos, CA - Lucity |
| • Sacramento County, CA – Infor Assets | • Bonney Lake, WA – Lucity |
| • Monterey, CA – Infor CDR, Assets | • Clackamas County, OR - Lucity |
| • Beverly Hills – Infor Assets | • El Paso, TX - Accela Automation |
| • San Diego County - Accela Automation | • Sacramento County - Accela Automation |
| • City of Buena Park, CA - Lucity | • Peoria, AZ - Accela Automation |
| • Gwinnett County, GA - Business Assessment | • Cleveland, OH - Accela Automation |
| • Pinal County, AZ - Accela Automation, Lucity | • Ft Collins, CO - Accela Automation |
| • Oceanside, CA - Lucity | |

Enabling Partners, LLC

Cleveland, OH

2005 – 2006

Helped build Enabling Partners into a larger, more successful, company.

Responsibilities included:

- Acted as the project manager, business analyst, configuration specialist, report developer, programmer and/or quality assurance specialist in solo or team projects.
- Developed, maintained and implemented project timelines and deliverables
- Maintained system life cycle procedures and documentation

- Managed end user support procedures and productivity
- Built relationships with other companies.
- Built standards for Enabling Partner's government section.
- Built a strong team of employees.
- Managed employees within the Enabling Partner's government section.

Notable Projects:

- | | |
|--|---------------------------------------|
| • City of Buena Park CA - Lucity | • Pinal County AZ - Accela Automation |
| • Mesa County CO - Lucity | • City of Kansas City MO -Kiva |
| • Oklahoma City OK - Accela Automation | • City of Bridgeport TX - Lucity |
| • Butler County OH - Accela Automation | • City of Atlanta GA - Kiva |

Hansen Information Technologies

Sacramento, CA

1996- 2005

Project Director, 1998-2005

Directed large-scale project implementations with teams of people composed of both company and client personnel

Notable Projects:

- | | |
|-------------------------|-------------------------|
| • City of Shoreline, WA | • City of Peoria, AZ |
| • City of Las Vegas, NV | • Pima County, AZ |
| • City of Riverside, CA | • City of Nashville, TN |
| • City of Chicago, IL | |

Data Conversion Manager, 1997-1998

Managed all Productivity of data conversion department

Responsibilities included:

- Developed cost analyses of all data conversion projects
- Personnel management of all department employees
- Maintained priorities for all projects within department

Data Conversion Analyst, 1996-1997

Conducted requirements analyses and developed test and document conversion solutions to facilitate the implementation of all Hansen Version 7.x modules

SOFCityRE EXPERIENCE:

- | | |
|---------------------|-----------------------|
| • Accela Automation | • Microsoft Office |
| • Crystal Reports | • Java |
| • SSRS | • Hansen Technologies |
| • TruePoint | • Lucity |
| • Kiva | |

EDUCATION:

Bachelor of Science, Computer Science, 1996

Certified Scrum Master, 2016

Certified Scrum Developer, 2016