

RESOLUTION NO. 2018-299

A RESOLUTION AUTHORIZING A CONTRACT AWARD TO A STATE CONTRACT VENDOR, SHI INTERNATIONAL CORP., SOMERSET, NJ, FOR THE MTS (ONBASE) AGENDA MANAGEMENT SOFTWARE, IN THE AMOUNT OF \$109,030.71.

WHEREAS, the City of Vineland pursuant to N.J.S.A. 40A:11-12a and N.J.A.C. 5:34-7.29(c), may by resolution and without advertising for bids, purchase any goods or services under the State of New Jersey Cooperative Purchasing Program for any State contracts entered into on behalf of the State by the Division of Purchase and Property in the Department of the Treasury; and

WHEREAS, the City of Vineland intends to enter into a contract with a State Contract Vendor for the MTS (OnBase) Agenda Management Software, through this resolution and properly executed contracts, which shall be subject to all the conditions applicable to the current State contracts;

WHEREAS, it has been recommended that contract be awarded to SHI International Corp., Somerset, NJ, (A89851) based upon the proposal received, in an amount of \$109,030.71; and

WHEREAS, the availability of funds for said contract to be awarded herein have been certified by the Chief Financial Officer; and

WHEREAS, the City of Vineland has certified that this meets the statute and regulations governing the award of said contracts;

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF VINELAND, as follows:

1. THAT this contract for the SHI International Corp., Somerset, NJ, (A89851) is awarded pursuant to N.J.S.A. 40A:11-12a and N.J.A.C. 5:34-7.29(c), under the State of New Jersey Cooperative Purchasing Program.
2. THAT the Purchasing Agent be and the same is hereby authorized to issue a contract to SHI International Corp., Somerset, NJ, based upon the proposal received, for the MTS (OnBase) Agenda Management, in an amount of \$109,030.71.

Adopted:

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President of Council

ATTEST:

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City Clerk

REQUEST FOR RESOLUTION  
FOR COOPERATIVE CONTRACT AWARDS  
UNDER 40A:11-12, N.J.A.C. 5:34-7.29 & LFN 2012-10  
(REQUIRED FOR PURCHASES OVER \$17,500.00)



7/13/2018

(DATE)

1. Goods or Services (detailed description): MTS (OnBase) Agenda Management Software

2. Amount to be Awarded: \$ 109,030.71

- Encumber Total Award  
 Encumber by Supplemental Release

3. Budgeted: By Ordinance No. \_\_\_\_\_  
Or Grant: Title & Year \_\_\_\_\_

4. \*\*Account Number to be Charged: 021-0-00-00-0000-2-5518633

5. Contract Period (if applicable): N/A

6. Date to be Awarded: 7/31/2018

7. Recommended Vendor and Address: SHI International Corp. Suite 101 290 Davidson Ave.

Somerset, NJ 08873-4179

8. Justification for Vendor Recommendation:(attach add'l information for Council review)  
SHI International Corp. Quote  
MTS Statement of Work

Type of Contract:  State  National  Regional  County

Vendor's Cooperative Contract # A89851

9. Evaluation Performed by: IS Division Staff, City Clerk and Staff and Business Administration Staff

10. Approved by: Victor B. Terenik Jr. *VB*

11. Attachments:

- Awarding Proposal  
 Other: Quote, Statement of Work

- Send copies to: **Purchasing Department**  
**Business Administration**

\*\*If more than one account #, provide break down



Pricing Proposal  
Quotation #: 15614020  
Created On: 7/9/2018  
Valid Until: 7/31/2018

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## NJ CITY OF VINELAND

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## Inside Account Manager - NJ Team

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### Victor Terenik

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### Kyle George

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Fax: 732-652-0810  
Email: Kyle\_George@shii.com

All Prices are in US Dollar (USD)

Product	Qty	Your Price	Total
1 OnBase Agenda MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$5,150.00	\$5,150.00
2 OnBase Agenda Concurrent Client MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	15	\$515.00	\$7,725.00
3 Local Government Workflow/WorkView Named User Client SL MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	5	\$1,112.40	\$5,562.00
4 Agenda Media Subscription AGEIS12 MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$9,270.00	\$9,270.00
5 Local Government Integration for YouTube for Meeting Video MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$8,240.00	\$8,240.00
6 PDF Framework MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$3,090.00	\$3,090.00

7	Local Government Agenda Voting MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$8,240.00	\$8,240.00
8	Annual Maintenance and Support MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$10,873.71	\$10,873.71
9	Fixed Cost Implementation Services MTS Software Solutions - Part#: Contract Name: Software Reseller Contract #: ITS58 Subcontract #: 89851	1	\$50,880.00	\$50,880.00
			Total	\$109,030.71

#### Additional Comments

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date listed above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order. For any additional information including Hardware, Software and Services Contracts, please contact an SHI Inside Sales Representative at (888) 744-4084.

SHI International Corp. is 100% Minority Owned, Woman Owned Business.  
TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTFO

*The Products offered under this proposal are subject to the SHI Return Policy posted at [www.shi.com/returnpolicy](http://www.shi.com/returnpolicy), unless there is an existing agreement between SHI and the Customer.*



**SOFTWARE SOLUTIONS**  
FASTER, SMARTER WAYS TO DO BUSINESS

## ***City of Vineland Agenda Management***

**Prepared By: Errol Doerr**

**Contract #: COV06252018A**

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## **Section I – Executive Summary**

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Based on our recent discussions regarding our IT Agenda Management solution recommendations, MTS Software Solutions is pleased to provide a statement of work for City of Vineland Agenda Management Solution. MTS Software appreciates the time and effort put forth by each of the key department personnel who participated in requirements and solution discussions.

This statement of work includes not only our overall project plan, project methodology and cost for the solution but also the project assumptions factored into the deliverable solution for City of Vineland.

We appreciate the opportunity to partner with City of Vineland and we are highly confident that our proven implementation expertise with OnBase can be leveraged to ensure a successful Agenda Management Solution that will not only meet your requirements but exceed expectations. We remain poised to respond to your questions and concerns regarding this statement of work.

## **Business Requirements**

The primary objective is to provide an Agenda Management solution by leveraging the existing City of Vineland OnBase System combined with the proposed Agenda Management components.

The Agenda Management solution will provide the ability for users granted with the appropriate privileges & product rights in OnBase to create meetings, manage the review and approval process for meeting agenda types, manage and record the meeting Minutes, generate agenda documents such as the Meeting Agenda, Agenda Packet, Meeting Minutes, and provide access to the Published documents through the Online Agenda Portal.

The following items below have been identified as the primary requirements for the City of Vineland Agenda Management Solution.

### **Agenda Management Functional Requirements:**

1. **Creating Meetings, Agenda Items, and Routing for Approval:** Agenda solution will allow for creating of meetings, agenda types, and automate the review and approval process for agenda items.
  - 1.1. Agenda Management Solution shall support creation, and management of up to 3 different Meeting Types.
  - 1.2. Agenda Management Solution shall support creation of up to 2 Agenda Type Forms for use with each Agenda Meeting Type.
  - 1.3. Agenda Management Solution shall allow for automating the Review, and Approval of proposed Agenda Types.
2. **View Only Access to Meeting and Agenda Items**
  - 2.1. Agenda Management Solution shall allow up to 10 users to access the Agenda Client for viewing only of upcoming Meetings, Pending Agenda Items, and related supporting documents.
3. **Managing Meetings:**
  - 3.1. Agenda Management Application Shall provide up to 2 users with access to the Agenda Minutes Client for managing the Meetings, and documenting Meeting Minutes, Roll Call, Speakers, Motions, Motion Vote Results.
  - 3.2. Agenda Management Solution shall allow for generating of up to 5 Word formatted Documents based on the Meeting and Agenda Types such as a Staff Report, Agenda, Meeting Minutes, Agenda Packet documents.



- 3.3. Agenda Management Solution shall allow for publishing of Agenda Meeting Minutes, and Documents to the an externally accessible Agenda Site where internal and external users can access when granted the appropriate privileges.
4. Recording Voice, Video, and Streaming:
  - 4.1. Agenda Management Application Shall allow recording of each voice and video of each meeting.
  - 4.2. Agenda Management solution shall allow for archival of voice and recording to online portal.
  - 4.3. Agenda management solution shall allow for streamlining to YouTube.
5. Agenda Management Solution shall allow for publishing generated documents to a PDF format by leveraging workflow automation.
6. Agenda Management will centrally archive all supporting documents that are generated, or documents uploaded externally from OnBase, and ensure they are tied to the Agenda Meeting.

## Section II –Proposed Solution

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The following information highlights and defines the major components of the proposed solution.

### **Solution Overview**

The OnBase Agenda Management Suite enables government organizations to effectively manage a variety of meeting types, and proposed agenda items by automating the process of creating meetings and meeting documents, gathering votes and minutes during the meeting, automating the Proposed Agenda Items Review and Approval process, along with publishing meeting information to your website

MTS Proposes that we leverage City of Vineland’s existing OnBase system along with acquiring the modules OnBase Agenda, Agenda Voting, Workflow/Workview Named Client, Agenda Media Subscription, Integration for YouTube, and PDF Framework in order to meet City of Vineland’s Agenda Management Functional Requirements.

- **Creating Meetings, Agenda Items, and Routing for Approval (1.1, 1.2, 1.3)**
  - OnBase Agenda: Users who have been granted the appropriate product and privileges can create meeting dates, Agenda items, upload related documents, and route items for review through workflows. Meeting documents and supporting materials can be compiled and packaged for easy distribution to stakeholders, council members, and others. Note that discovery session(s) will be necessary at the time of delivery to identify lower level business process requirements to finalize the Agenda Item supporting Workflow.
  - Workflow: Leverage Workflow to streamline and automate the review and approval agenda type process from submission, review, and approval.
  
- **View Only Access to Meeting and Agenda Items (2.1)**
  - OnBase Agenda: Users who have been granted the appropriate product and privileges can search and view meeting item dates and pending approval or approved Agenda Items. OnBase utilizes OnBase User Groups to restrict or grant product and privileges to users. We can also limit the functionality to read or view only participation for those users who should only have access to view meetings, agendas, and supporting documents.
  
- **Managing Meetings (3.1, 3.2, 2.3)**
  - OnBase Minutes: User who have been granted the appropriate product and privileges can access the Minutes Client to record motions, votes, minutes and other facets of the meeting. In addition, agenda items can be added, removed,

edited and re-arranged as changes occur during the meeting, along with generating the Agenda, Meeting Minutes, Meetings Packets, and Staff Reports for attachment to the Meetings, archival into OnBase, and Publishing to the Agenda Online Portal for external Access.

- OnBase Agenda Online: A customizable web portal that allows the publication of meeting documents to your website with a single click, making information available to constituents and shareholders. In conjunction, agenda item supporting material can be easily selected for publication to the website.
  
- **Recording Voice, Video, and Streaming: (4.1, 4.2, 4.3)**
  - Agenda Media: Provides the ability to record, view, publish, and archive video and audio content related to an event live or on-demand.
  - Integration with YouTube: Integrate YouTube with OnBase Agenda Management to enable viewing of live and on-demand meetings on your YouTube channel.
  
- **Publishing a PDF: (5)**
  - PDF Framework: Provides the ability to using the create PDF or TIFF functionality Action in Workflow.
  
- **Archival: (6)**
  - Agenda & Minutes client: Documents can be generated directly from the Agenda Client such Agenda, Meeting Minutes, Meetings Packets, and Staff Report. Documents generated our uploaded through the clients are automatically tied to the Agenda Items, and Meetings.
  - Document Types: All generated, uploaded documents are archived within OnBase Document Types, and can be retrieved at any time by those users have been granted rights to do so.

## **Solution Components**

### **OnBase Overview**

OnBase is a fully integrated enterprise content management (ECM) software suite used by more than 15,000 mid-tier and Global 2000 enterprises to capture, route, manage, share and archive high volumes of corporate information critical to business operations. The elimination of low-value manual tasks through core OnBase functionality increases employee productivity and operational efficiency.

OnBase has been installed at City of Vineland. MTS will enhance this process by adding the following components to the system.

### **Agenda Management**

The OnBase Agenda Management Suite enables government organizations, corporations and universities to effectively manage a variety of meeting types by automating the process of creating meetings and meeting documents, gathering votes and minutes during the meeting, and publishing meeting information to your website.

In **OnBase Agenda**, staff can create agenda items, upload related documents and route items for review through workflows. Meeting documents and supporting materials can be compiled and packaged for easy distribution to stakeholders, council members, and others.

**OnBase Minutes** streamlines the meeting process. It provides a means to record motions, votes, minutes and other facets of the meeting. In addition, agenda items can be added, removed, edited and re-arranged as changes occur during the meeting.

**OnBase Agenda Online** is a customizable web portal that allows the publication of meeting documents to your website with a single click, making information available to constituents and shareholders. In conjunction, agenda item supporting material can be easily selected for publication to the website.

After the meeting, the OnBase Agenda Management Suite continues to assist in the finalization of the meeting process, such as the ability to add post-meeting documents to agenda items and completion of minutes for publication. This comprehensive Agenda Management solution is designed to streamline your processes and assist you throughout your entire meeting process.

## **Benefits**

- Automates and streamlines agenda creation and distribution, reducing manual tasks and eliminating costly paper processes
- Ensures that the most current versions of documents are included in meeting packets
- Supports collaboration among staff by allowing users from multiple locations to simultaneously participate in the agenda planning process
- Reduces staff time required to assemble meeting packets, creating time for higher-value tasks
- Increases transparency by offering a comprehensive view of the process and the status of individual agenda items

## **Key Features**

- Automatically creates, assembles, updates and distributes meeting packets
- Automates the addition of ordinance and resolution numbers, page numbers and placeholder pages
- Electronic distribution eliminates paper packets, increasing ROI and conserving budgeted funds for higher-value projects
- Offers instant access to agenda updates, changes and ad hoc submissions, enabling staff to stay on top of requests
- Captures attendance, motions and votes, and automatically routes items for follow-up after a meeting occur

## Agenda Media

Agenda Media provides the ability for you to record view, publish and archive video and audio content related to an event, so that you may view the event content live or on-demand. Agenda Media Integrates with the following modules.

- OnBase Agenda
- Onbase Minutes
- OnBase Agenda Online

## Integration for YouTube for Meeting Video

Integration between OnBase Minutes and YouTube to enable the view of live and on demand meetings on your YouTube Channel.

## Agenda Voting

Agenda Voting provides the ability to communicate the voting process of agenda items to the public. This solution allows voting members and support personal the opportunity to electronically view items and supporting documentation on the agenda and to electronically cast votes to recoding the events of the meeting to make it easy for the support personnel to follow along and manage the meeting as it is in session.

The Voting solution consists of six main applications that all work together to give you a seamless meeting process. The applications that work together include:

**OnBase Agenda:** This is the application used to configure meeting members and meeting creation.

**OnBase Minutes:** This application allows the meeting administrator to run the meeting and voting processes.

**Voting Client:** This allows voting members and support personal the opportunity to follow along with the meeting and to electronically cast votes on motions.

**Voting Display:** This application provides the ability for the public to follow along with the meeting in the meeting room as it progresses.

**Application Server:** Facilitates real time communication among all clients

**Board Meeting Service:** Facilitates real time communication among all clients

## **Workflow**

OnBase Workflow is an automation engine and electronic routing system that enables organizations to process work faster and more efficiently. A rich set of point-and-click configurable rules and actions allows business processes to be quickly automated with no need for custom programming. Workflow enables organizations to significantly decrease document processing time, increase staff productivity and improve input, storage, and retrieval accuracy through a simple and flexible user interface.

### **Benefits**

- Facilitates business transaction processing by presenting all related documents and data to the user
- Optimizes business processes by providing a framework of rules to efficiently route electronic documents and data
- Promotes accountability by providing detailed auditable history to monitor security and employee performance
- Offers flexible deployment and access across multiple interfaces and line of business integrations
- Enforces consistent business practices, reducing process variance and associated risk.

### **Key Features**

- Over 185 pre-defined Rules and Actions make it easy to configure Workflow Life Cycles to automate business processes
- Flexible and user-configurable interfaces that can be customized and filtered by role
- Automatic e-mail notifications engage users to participate in Workflow when needed
- Configurable Timers provide automation and unattended document processing
- Role-based Calendars and Load Balancing ensure documents are processed most efficiently by available users

## Section III – Proposed Solution Architecture

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### Software Licensing

MTS recommends the following OnBase modules and licenses to build an Agenda Management Solution.

#### Agenda Management Application

- OnBase Agenda (1)
- OnBase Agenda Concurrent Client (15)
- Workflow/Workview Named Client SL (5)
- Local Agenda Voting (1)
- Agenda Media Subscription (1)
- Integration with YouTube Meeting Video (1)
- PDF Framework (1)



## Section IV – Scope of Work

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### Hardware

MTS will leverage City of Vineland existing hardware infrastructure.

### Software

The following is a high-level scope of work for the software components and configuration requirements for the Agenda Management Solution. Scope of work will be updated as part of the Requirements Definition process.

- Agenda Management Solution:
  - Implementation and setup of modules detailed under Software Licensing: OnBase Agenda, OnBase Agenda Concurrent Clients, Local Agenda Voting, Workflow/Workview Named clients, Agenda Media Subscription, Integration with YouTube Meeting Video, and PDF framework.
  - Design & build of up to 3 Meeting Types, and 2 Agenda Types per Meeting Type.
  - Design up to 2 documents each for Meeting Agenda, Agenda Packet, Meeting Meetings, Summary Packet, and Staff Report
  - Design and Build Agenda Type Submission, Review, and Approval Workflow
    - Up to 10 Workflow Queues
    - Up to 4 Ad-hoc Tasks per Queue
    - Up to 5 users configured with access

### Training

To ensure user adoption and a successful rollout MTS will provide end-user training that will include both functional and administration aspects of Agenda Management Solution. Training details are documented in the implementation section.

### System Documentation

MTS will provide system documentation that will include details on system architecture, module-specific reference guides and documentation on approvals management that can be used by City of Vineland administrators for preliminary troubleshooting and backup purposes. Additionally, role specific user guides will also be provided for end-users that will assist in performing specific functions. An internal knowledge transfer will be facilitated with MTS Support Group to provide ongoing support after the solution is successfully rolled out in production.

## City of Vineland Resources

MTS will need City of Vineland partnership in ensuring a successful software implementation. To that end the following City of Vineland resource will be needed:

### BUSINESS ANALYST

The requirements gathering, and analysis phase of the project will require a business analyst and/or a department manager to help fill in the finer details of the Agenda Management existing process and the solution requirements. The input provided will help in identifying core business objectives and in crafting a solution design that fills those gaps.

### IT ADMINISTRATOR

During the configuration phase of the project, MTS will require a City of Vineland administrator to grant access to servers, setup NTFS rights to resources and setup appropriate service accounts on all related servers. Additional database administration assistance may be needed when executing SQL queries or in ensuring proper communication between the servers and the backend databases.

### USER ACCEPTANCE TESTING (UAT) TEAM

City of Vineland will need to create/identify a UAT team during the testing phase that can run real-world simulations to ensure the system is working as per requirements. The UAT team's knowledge of the business is critical to the systems success. In addition, they will be the first group trained on the system and their feedback will help fine tune the system.

### CLIENT PROJECT MANAGER

City of Vineland Project manager will act as a single point of contact for all communications with MTS. City of Vineland project manager will be responsible for overall project management including creating integrated project plan and interfacing with MTS.

## Section V – Implementation Phase Descriptions

The success of MTS solutions has been expedited and enhanced by the MTS Professional Services Group through the use of a streamlined waterfall methodology. The main elements of our implementation methodology are:

- Incremental implementation phases for improved project control and more rapid realization of benefits
- Rapid deployment of a base solution in the initial implementation phase. This will provide a foundation for understanding the technology and validating the definition of subsequent implementation phases
- Knowledge transfer - educate end-user and administrative resources on process analysis & re-design techniques and product knowledge

MTS will commit the necessary resources and expertise to develop a solution using the following phases.



### Project Kickoff Meeting

A project kickoff meeting will be organized with all the key stakeholders to review the scope of the project, identify business goals, identify project resources, define communication plan, discuss implementation approach and identify key milestones.

### Requirements Analysis

City of Vineland and MTS Software will work together to review the business requirements. MTS will interview key stakeholders and perform business analysis on the Agenda Management business process. Topics such as system configuration, design of Meeting Types, Agenda Types, Generated Meeting Documents, Document Types, Agenda Item Submit, Review & Approval Workflow, and user group security will be discussed in detail. The information gathered will be used to construct an implementation plan and submitted to City of Vineland for review and consent.

The implementation plan will contain details on the scope of the project, solution design, process flow of Agenda Management Agenda Items, change management committee (comprised of key City of Vineland stakeholders and MTS project team), resources that will be working on this project and the master project schedule.

The implementation plan sign off will initiate the development phase of the project. Any changes identified after requirements will be reviewed by the change management committee and an impact analysis will be conducted to determine the best course of action.

When there are significant deviations from scope baseline, MTS Software will provide a formal Change Order that will include impact analysis, cost and assumptions for sign-off. The approved change request will trigger detailed documentation of the business/technical requirements in the appropriate project documents.

## **Solution Design and Development**

MTS engineers will develop the Agenda Management Solution in City of Vineland test/development environment and use this as a workspace to configure the various aspects of the solution as per the approved implementation plan. Initial setup will be performed remotely, and all subsequent development work will be done remotely. MTS will engage City of Vineland as needed to review the setup in different iterative steps. If a Test Environment does not yet exist, MTS engineers will create a Test Database.

## **User Acceptance Testing**

MTS will perform the initial testing of the entire solution once all the applications have been configured. The system will then be turned over for user acceptance testing. The City of Vineland UAT team will perform different test cases to make sure the system works as expected. Any issues encountered in this phase will be logged and reviewed by the MTS implantation team. The goal of this phase is to simulate Agenda Management process and make sure City of Vineland is satisfied with the overall solution before rolling it out in production.

## **User Training**

MTS will provide two types of training – System Administration training and End-User training. The System Administration training will provide an overview of all the solution components from a configuration stand point). System administration training will be conducted onsite.

End-user training will provide an overview of all the functional aspects of the system (Creating Meetings, Submitting Agenda Items, Reviewing & Approving Agenda Items, managing meetings through the Minutes Client. MTS will conduct up to four (one-hour long) end-user training sessions (onsite and remote) and additional training programs can be conducted if needed (as a change order).

Additionally, MTS highly recommends that City of Vineland have someone on staff that is certified, via Hyland training, to administer the system and make ongoing configuration changes as needed for users.

## Onsite “Go Live” Support

On-site production support will provide the end users’ access to the installation team members for questions and assistance once the system goes “live”. This is the key to immediate and successful use of the system. MTS team member(s) will be onsite the first two days during this phase (this will be in addition to UAT support) to ensure the system is performing as required and to assist users and administrators with any questions they may have. The MTS team member(s) will also be available remotely for up to two weeks. An internal knowledge transfer will be facilitated with MTS Support Group to provide ongoing support after the solution is successfully rolled out in production.

## Project Management

The MTS project manager will manage all the resources identified for MTS tasks and ensures that tasks are completed according to the Project Plan. Project Manager tasks include:

- Develop detailed work plan for MTS tasks.
- Ensure system implementation is consistent with the project plan
- Communicate project status to City of Vineland Project Manager and MTS Team Members
- Update project documentation
- Obtain Project Sign-off
- Transfer and track responsibility of project deliverables

## Standard Support Procedures

MTS Support Desk is available Monday through Friday from 8:30 AM to 5:30 PM EST, except during MTS Software’s normally scheduled holidays and closures due to inclement weather. Support issues can be reported via email or by calling the support hotline. Issues are classified under the following categories:

**A priority issue:** A catastrophic failure that does not have a viable detour or workaround. A problem which has a serious impact on Client’s business.

**B priority issue:** A problem which causes a serious inconvenience. This includes problems that would be considered Priority A, but have a viable detour or workaround. A problem that is visible to the Client’s marketplace.

**C priority issue:** A problem that interferes with the effective use of the system which can be easily avoided, or a detour applied. A problem which has no impact on the Client’s business. A problem which is cosmetic and not visible to the Client’s marketplace.

## SUPPORT REQUEST PROCEDURE

**Step #1:** Call the support hot line number (866)-274-6243 option 2 or e-mail: support@mts-software.net for all support requirements. A customer support professional will answer your call and provide the required support.

**Step #2:** A customer support professional will enter into our tracking system a brief description of the issue, the type of issue and the priority classification. The analyst may ask for analyst may ask for additional information about the issue and enter that into the tracking the tracking system as a journal entry. The analyst will provide the customer with a call with a call identification number.

**Step #3:** The customer support professional will analyze the issue and work with the customer to schedule a time to log into the system via VPN access or request data or files from the customer by email, ftp, Cd etc.

**Step #4:** If the issue(s) is a priority 'A' issue and can't be resolved within two hours the issue will be brought to the attention of a team leader or Supervisor who will work with the customer support professional to resolve the issue as quickly as possible. The customer support professional will also provide the customer with the proper update and plan of action.

**Step #5:** For all B or C issues that cannot be resolved within the same day, a customer support professional will contact you that same day with a progress update. This step will be repeated each day as is practical until the issue(s) is resolved. If the issue has been reassigned to the programming group, a new contact name and number will be provided.

**Step #6:** If your issue requires a fix to be delivered, the following will be provided: a tentative delivery date, a test script, dependency analysis, release notes and an overview of the QA process followed by MTS. All releases will then be reviewed by the Support Manager to ensure the above steps have been followed.

Once approved, the release will be sent to the customer via FTP, CD or VPN and checked into our version control system.

**Step #7:** Issues will be closed by MTS (30) days after delivery of fix, unless indicated by the customer that the fix did not resolve the problem.

## ISSUE ESCALATION

Customer satisfaction is extremely important to us and we take pride in that our customer retention rate is over 98%. MTS engineers strive to provide the best technical support experience to our customers, but we understand there could be situations where an issue needs to be escalated in case our clients are not satisfied with our response times, issue resolution or the troubleshooting approach. Typical situations requiring escalation include conflicting resource demands threatening project staffing, group dependencies not being

met, scope disagreements, and issues with functionality of the project's deliverables nearing release time. To that end, MTS has established the following escalation procedure to make it easy for our clients to escalate an issue:



Additionally, as a partner and reseller of Hyland OnBase, we may escalate to Hyland as needed and work with Hyland on behalf of City of Vineland to secure a fix.

## Section VI – System Cost Configuration

### Agenda Management Solution

#### Software Pricing- Pricing provided by SHI International

Software Module Cost	Qty	Unit Price	Extended Price
OnBase Agenda	1		
OnBase Agenda Concurrent Client	15		
Local Government Workflow/WorkView Named User Client SL	5		
Agenda Media Subscription AGEIS12	1		
Local Government Integration for YouTube for Meeting Video	1		
PDF Framework	1		
Local Government Agenda Voting	1		
<b>Software Total</b>			
<b>Annual Maintenance and Support</b>			

#### Professional Services- Pricing Provided by SHI International

Implementation Services Cost	Price
Fixed Cost Implementation Services	

\*NOTE – Please refer to Appendix 1 for details on scope of work.

### Payment Terms

Below are the payment terms for this project:

- 100% of the Software License fees and Annual Maintenance and Support will be invoiced upon signing of the contract
- 50% of the Professional Services fees will be invoiced upon signing of the contract.
- 50% of the Professional Services fees will be invoiced upon installation of OnBase Modules into client’s environment for UAT testing.
- Net 30 payment terms for all invoice



## Terms & Conditions

- Initial Project Kickoff & Checkpoint Review meetings and product installation will be performed remotely. If Onsite activity is deemed necessary; the actual number of on-site days can be mutually discussed during the project planning meetings.
- A dedicated Project Manager and Technical resource from City of Vineland will be assigned to this project. City of Vineland Project manager will act as a single point of contact for all communications with MTS. City of Vineland project manager will be responsible for overall project management including creating integrated project plan.
- City of Vineland project manager will have the authority to formally accept all project deliverables and provide system solution clarifications.
- Desktop rollout for client components Agenda Client, and Minutes Client will be installed by City of Vineland. MTS will assist with guidance.
- Solution will be built in City of Vineland test environment and will be moved to the production environment after UAT. Some portions of the solution may be built in MTS's development environment and will be moved to City of Vineland's development environment for UAT. The application will be moved to the production environment only after UAT.
- The software modules and professional services proposed are based on our current understanding of requirements. A change order will be processed for any additional functionality requested during the requirements gathering phase.
- Any requirements, software or professional services not explicitly stated in this agreement are considered out of scope. All out of scope requirements will be implemented on a T&M basis @ \$1,600 per day.
- Remote system access to the client's servers will be needed during implementation and post implementation phase of the project
- Tools and utilities developed by MTS may be utilized as part of project configuration. In such cases, MTS own the licensing and source codes rights to such programs. MTS will notify when such programs are using during development of a solution.
- Taxes and Reasonable travel expenses (Car, Airfare, hotel, meals, Parking etc.) are additional and will be billed based on actual cost.
- City of Vineland will provide system software such as Operating systems, Application Servers with IIS, MS SQL Server database, and disk space required to implement the solution.
- City of Vineland will be responsible for network and infrastructure setup.
- MTS will leverage existing servers used by the current OnBase implementation at City of Vineland Should any new hardware is deemed required during the implementation stage of this project, City of Vineland will provide system software such as Operating systems, Application Servers with IIS, MS SQL Server database, and disk space required to implement the solution.

## Section VI - Authorization

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The following individuals approve this statement of work and are authorized to sign off on project phases, billable services, and expenses.

**City of Vineland**

**MTS Software Solutions, Inc.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## Appendix 1 – Scope of Service

<b>Project Initiation</b>
Identify project stakeholders
Uncover business goals and project implementation approach
Determine project timeline and escalation procedures
Identify Risks and change control plan
<b>Requirements Gathering</b>
Conduct Business Analysis
Define business requirements & use cases for Agenda Management Solution
Develop Implementation Plan (Requirements Definition)
<b>Design</b>
Design Agenda Management Meeting Types, Agenda Types, Agenda Documents (Meeting Agenda, Agenda Packet, Meeting Meetings, Summary Packet, and Staff Report), & Supporting Agenda Type Submission, Review, and Approval Workflow
Create prototype in test environment
Conduct Design review meetings with City of Vineland
Design sign-off
<b>Implementation</b>
License New modules or components
Build & Install Agenda Management Solution to include Meeting Types, Agenda Types, and Supporting document types, User Groups, and Agenda Documents.
Build supporting Agenda Type Submission, Review, and Approval Workflow
Install Agenda Online Portal
Generate Agenda documents such as the Agenda, Agenda Packet, Meeting Minutes,
Installation of Test Database & Test Web/Application Server
<b>QA</b>
Conduct UAT (Up to 2 weeks)
QA Support (Up to 1 week)
<b>Training</b>
System Documentation
Train-the-Trainer End User Training
System Administration Training
<b>Production Rollout</b>
Migrate solution components to Production Server
Provide MSI installers for mass rollout of client components
Go-Live Support (Up to 1 week)