AMENDMENT NO. 1
to
Contract Purchase Agreement: 426855
between
Board of County Commissioners Pinellas County
and
Carahsoft Technology Corporation

This is Amendment No. 1 to the Contract Purchase Agreement: 426855 (Agreement) between Board of County Commissioners Pinellas County ("Buyer") and Carahsoft Technology Corporation ("Seller").

WHEREAS, Seller and Buyer have entered in to the Agreement dated April 27, 2017, and

WHEREAS, Seller and Buyer desire to amend said Agreement.

THEREFORE, Seller and Buyer hereby agree as follows:

1) Buyer's 208 perpetual licenses will convert to 210 SaaS users:

Number of Users	*$ Per User Per Month*	*Total $ Per Month*
210	$ 168.36	$ 35,355.91

2) Seller will offer an annual uplift of 2.5%
3) Seller will evaluate Buyer's user counts on an annual basis (at the end of each 12-month term) and bill according to the amount of users for that coming support and maintenance year. This will be subject to bulk pricing terms.
4) This pricing is based on a six-year term as set forth below:

IN WITNESS THEREOF, the parties have caused this Amendment to be executed by their duly authorized representatives.

BUYER

By:_____

Title:_____

Date:_____

SELLER

By: Kristina Smith

Title: Contracts Manager

Date 8-9-18

APPROVED AS TO FORM

By:_____

Office of the County Attorney

GOVERNMENT - PRICE QUOTATION

ACCELA GOVERNMENT AT CARAHSOFT

1860 MICHAEL FARADAY DRIVE | SUITE 100 | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
WWW.CARAHSOFT.COM

TO:
Bryan Zumwalt
CIO
Pinellas County
400 S. Ft. Harrison Ave
Clearwater, FL 33756 USA

EMAIL: bzumwalt@co.pinellas.fl.us
PHONE:

FROM:
Daniela Canedo
Carahsoft Technology Corp.
1860 Michael Faraday Drive
Reston, Virginia 20190

EMAIL: Daniela.Canedo@carahsoft.com
PHONE: (703) 871-8663 **FAX:** (703) 871-8505

TERMS:
GSA Schedule No: GS-35F-0119Y
Term: December 20, 2011 - December 19, 2021
FTIN: 52-2189693
Shipping Point: FOB Destination
Credit Cards: VISA/MasterCard/AMEX
Remit To: Same as Above
Payment Terms: Net 30 (On Approved Credit)
Cage Code: 1P3C5
DUNS No: 088365767
Business Size: Other than Small
Sales Tax May Apply

QUOTE NO:	11992615
QUOTE DATE:	05/24/2018
QUOTE EXPIRES:	09/30/2018
RFQ NO:	
SHIPPING:	GROUND
TOTAL PRICE:	$424,267.20
TOTAL QUOTE:	$424,267.20

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
		YEAR 1				
1	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc - SS10APFMSLVR001		$2,020.32 GSA	210	$424,267.20
		SUBTOTAL:				$424,267.20

TOTAL PRICE: **$424,267.20**

TOTAL QUOTE: **$424,267.20**

SUGGESTED OPTIONS

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
		YEAR 2				
2	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc - SS10APFMSLVR001		$2,070.83 GSA	210	$434,874.30
		YEAR 2 SUBTOTAL:				$434,874.30
		YEAR 3				
3	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc - SS10APFMSLVR001		$2,122.60 GSA	210	$445,746.00
		YEAR 3 SUBTOTAL:				$445,746.00
		YEAR 4				
4	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc - SS10APFMSLVR001		$2,175.67 GSA	210	$456,890.70

1860 MICHAEL FARADAY DRIVE | SUITE 100 | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
WWW.CARAHSOFT.COM

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
		YEAR 4 SUBTOTAL:				$456,890.70
		YEAR 5				
5	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc - SS10APFMSLVR001		$2,230.06 GSA	210	$468,312.60
		YEAR 5 SUBTOTAL:				$468,312.60
		YEAR 6				
6	SS10APFMSLVR001	Accela Civic Platform Silver - Subscription User Accela Inc - SS10APFMSLVR001		$2,285.81 GSA	210	$480,020.10
		YEAR 6 SUBTOTAL:				$480,020.10
		SUGGESTED SUBTOTAL:				$2,285,843.70

Statement of Work

Pinellas County, FL

SOW Amendment 1
Version 4.0

June 19, 2018

Carahsoft Technology Corp
1860 Michael Faraday Drive
Suite 100
Reston, VA 20190
Tel: 703-871-8500
Fax: 703-871-8505

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carahsoft

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DOCUMENT CONTROL

Date	Author	Version	Change Reference
04/10/2018	Michelle Hogan	1.0	Initial draft
05/15/2018	Michelle Hogan	2.0	review and feedback added.
05/30/2018	Rocky Copeland	3.0	Reviewed and minor modifications made
06/19/2018	Rocky Copeland	4.0	Modified the payment milestones table

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Purpose

The purpose of this amendment is document no cost changes to this Statement of Work ("SOW") dated February 7, 2017 sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the "Services") to be provided by Accela ("Accela") to Pinellas County, Florida ("Pinellas") using the Accela Standard Methodology to modernize systems. The Accela Standard Methodology streamlines the implementation to:

1. Train on and walkthrough the Accela platform solution earlier to minimize conceptualization
2. Reduce configuration complexity working from pre-configured best practice standards
3. Deliver a working solution more quickly
4. Increase long term maintainability
5. Improve the customer experience

The purpose of this document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise the implementation of Accela Civic Platform Land Management for Pinellas. Accela will provide professional services for implementation of the above modules and products per the Work Description section detailed henceforth. The following Pinellas departments comprise the organization scope of the implementation described herein:

- Building
- Development Review Services
- Planning
- Code Enforcement
- Utilities
- Public Works
- Solid Waste
- Air Quality

The number of workflows and record types considered in scope for this project are as follows:

- Up to 36 workflows
- Up to 100 record types

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The workflows and record types may be used by the above referenced departments in a manner defined by Pinellas. The following table shows an initial understanding of the distribution of workflows and record types.

DEPARTMENTS	WORKFLOWS	RECORD TYPES
Building	8	20
Development Review Services	10	25
Planning	4	10
Code Enforcement	4	10
Utilities	1	8
Public Works	4	10
Solid Waste	1	2
Air Quality	4	15
TOTAL	36	100

PROJECT TIMELINE

The term of this project is 18 months and 1 phase.

Any delays (eg, Change in staff level/availability, missed deadlines) in the Project Timeline which by agreement were created by Pinellas will result in an increase in the duration of the project will require a Change Order to reimburse Accela for the additional costs associated with the delay, including but not limited to additional hours for project management, deliverable development and review.

Upon execution of this Amendment, the parties will collaborate to determine a start date for Services to be rendered. Upon initiation of these Services, the Accela Project Manager will work with Pinellas to collaboratively define a baseline project schedule. Given the fact that project schedules are working documents that change over the course of the project, the Accela Project Manager will work closely with Pinellas to update, monitor, agree, and communicate any modifications.

PROJECT MANAGEMENT

Accela will provide a project manager and two engagement oversight directors for services throughout the implementation to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Civic Platform software at Pinellas, Accela will provide Project Management services throughout the project. Generally, these services include the following:

- Project plan management using Microsoft Project - 2007 format,
- Project document management using Pinellas County Hosted Microsoft SharePoint project site,
- Issue log management and escalation,
- Status reporting,
- Change order management,
- Project workspace management,
- Resource management (Accela's and implementer's resources),
- Executive project oversight and quality assurance.

By agreement, some project management tasks may be shared between the Accela Project Manager and Pinellas Project Manager.

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ORGANIZATIONAL CHANGE MANAGEMENT

The County utilizes the organizational change management (OCM) discipline for software implementations. The County will provide a dedicated Change Management Lead to spearhead all organizational change management efforts. throughout the project to meet business, schedule, and budget objectives. OCM activities include (but are not limited to) the following:

- Prepare an organizational change management strategy addressing the "people side" of change to include plans for leadership alignment, communications, change impact analysis (through business process re-engineering) and training. The Change Management Team will focus on changes to business processes, systems, and technology, job roles, and organization structures.
- Provide consulting and partnership in planning and executing change management activities, with emphasis on maximizing employee engagement and minimizing employee resistance.
- Provide tools and techniques for identifying and mitigating change management risks.

By agreement, some OCM tasks may be shared between the appropriate Accela representative(s) and the appropriate Pinellas representatives.

CRITICAL SUCCESS FACTORS

To successfully execute the services described herein, there are several critical success factors for the project that must be closely monitored and managed by the stakeholders. These factors are critical in setting expectations between Pinellas and Accela, identifying and monitoring project risks, and promoting strong project communication.

- **Knowledge Transfer** – While Accela cannot guarantee specific expertise for Pinellas staff as a result of participating in the project, Accela will make all reasonable efforts to transfer knowledge to Pinellas. It is critical that Pinellas personnel participate in the analysis, configuration and deployment of Accela Civic Platform in order to transfer knowledge to Pinellas. Once Post Production assistance tasks are completed by Accela Services, Pinellas assumes all day-to-day operations of Accela Civic Platform outside of the Support and Maintenance Agreement. The Service and Maintenance Agreement does not cover any Pinellas manipulation of implemented scripts, reports, interfaces and adapters. Key knowledge transfer areas include:
  - Configuration
  - Scripting
    - Batch scripts
    - Interfaces
    - Event Management Scripts
  - Reports and Forms

- **Dedicated Pinellas Participation** – Accela fully understands that Pinellas staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the Accela Civic Platform implementation project. However, it is critical that Pinellas acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the Project Plan. Accela will communicate insufficient participation of Pinellas and Accela resources through Project Status Reports with real and potential impacts to the project timeline. Accela will work the project sponsors and department leaders to determine appropriate team member involvement. This could run from full-time during early analysis meetings to part-time during the technical implementation phase.

- **Deliverable Acceptance Process** - Implementation services for the above products are formalized through the deliverables defined in this document. Upon completion of each deliverable according to the acceptance criteria defined herein, Accela will provide Pinellas with a Deliverable Acceptance Form to formalize acceptance and completion. The Deliverable Acceptance Form is subsequently signed by the appropriate

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Pinellas contact, as defined in the Project Charter, and faxed/scanned/emailed or hand delivered to Accela. Please refer to Appendix A to view a sample Deliverable Acceptance Form. Accela respectfully requests prompt attention to the processing of all Deliverable Acceptance Forms, as adherence to this timely process directly impacts the ability to complete the project in the desired timeframe. To prevent delays in the project schedule, for all Deliverables where no response time is specifically identified in the SOW, a ten (10) business day acceptance period is assumed.

- **Accela Implementation Methodology** – Accela's successful, proven, implementation methodology is crucial to the project success. Accela's Civic Platform software and customer base is a niche market and as such the implementation methodology may differ from other consulting firms and software packages. It is imperative to project success that Pinellas is willing to adhere/adopt to the Accela Implementation Methodology.

- **Best Practice Templates** - Accela's Best Practice Templates, or pre-built business processes, are based on direct experience with hundreds of existing customers and domain experts. These templates are complete packages of working business processes including workflows, data structures, business logic, fees, form and standard reports. These will be utilized as the baseline for the Solution Foundation for this implementation which will assist decrease risk, expedite deployment and insure a superior utilization of the Accela Civic Platform solution.

ACCELA IMPLEMENTATION METHODOLOGY

Below is the approach to implement the Accela Civic Platform solution to modernize systems. The Accela Standard Methodology streamlines the implementation to:

1) Train on and walkthrough the Accela platform solution earlier to minimize conceptualization
2) Reduce configuration complexity working from pre-configured best practice standards
3) Deliver a working solution more quickly
4) Increase long term maintainability
5) Improve the customer experience

The Accela Standard Methodology consists of 4 main stages:

A. Define Stage
B. Refine Stage
C. Develop Stage
D. Deploy Stage

The first (Define) and last (Deploy) stages of project delivery flow in a linear direction, then the second (Refine) will have a more iterative approach to deployment than the third (Develop) stage. The Accela Professional Services team will deliver record types across predefined record groupings based on similar processes which will move through the Refine and Develop Stages in an iterative manner. These groupings of record types will be organized and prioritized into waves. Each wave will undergo Refine and Develop tasks and culminate in a Conference Room Checkpoint that will demonstrate an end to end working solution for a representative sample of records.

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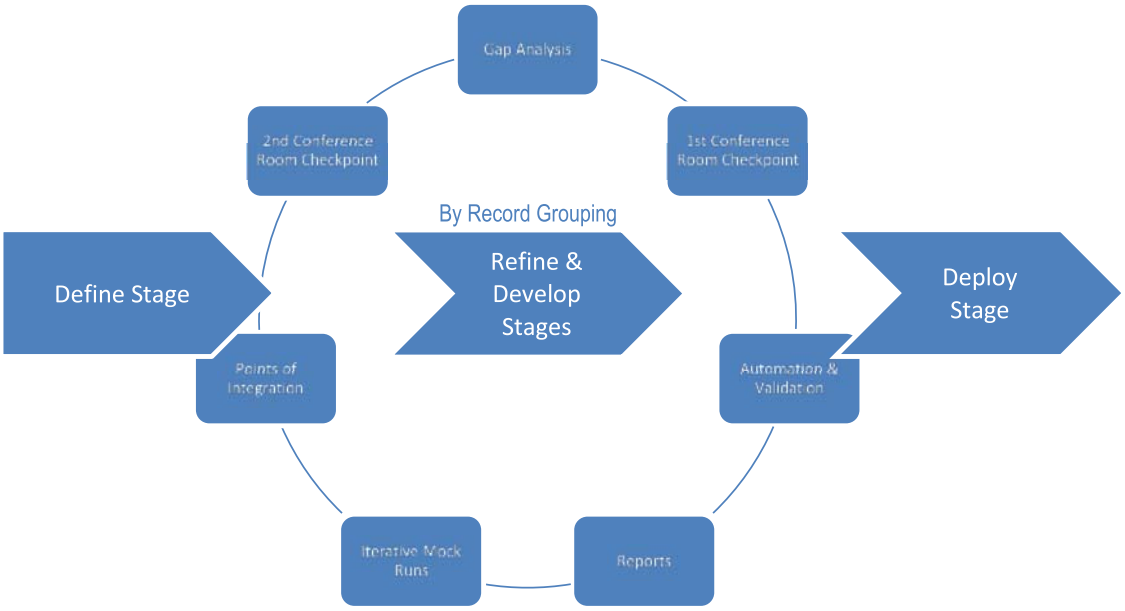

A. DEFINE STAGE

The Define stage will set the stage for how the project will be managed throughout the project life cycle. Given the status of the implementation, this stage will be abbreviated as much of this work has been completed. In this stage, there are three key deliverable tasks that will take place:

1.1.1 Project Set-up - The Accela Project Manager will set-up the Project SharePoint site, assign resources to the project (resource management), define the Project Charter based on Statement of Work, and define the Project Schedule and Project Management Plan. The project SharePoint site will be used primarily as the project archive.

1.1.2 Project Kick-off - This task sets the expectations for Pinellas and the key stakeholders on what's going to occur during the project life-cycle.

1.1.3 Initial Core Team Training - Civic Platform Core Team Training – up to 2 days, 12 max attendees. This begins the knowledge transfer between Accela terminology and the gap analysis workshops overview

Business Owner's Required to attend:

- Parks and Preserves / Air Quality
- Planning
- Development Review Services
- Code Enforcement
- Building
- Public Works
- Utilities

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B. REFINE STAGE

There are five key deliverable tasks that occur in the Refine Stage:

1.2.1 Accela Add-on Component set-up - Setting up the additional add-on components as acquired such as Accela Citizen Access, Accela Mobile Applications, Accela GIS, and Electronic Document Review System. The set-up of these components will support the Refine Conference Room Checkpoint to gain a high-level understanding of the solution.

1.2.2 Data Conversion Knowledge Transfer - The Technical Consultant will assist with data mapping by providing a table containing the Accela data fields and will train and instruct on how to start mapping data to the data fields. Once complete, the Accela technical consultant will instruct on how to transfer the mappings to the Accela data mapping tool, identify source systems and any areas where scripting is needed to convert the data.

1.2.3 Gap Analysis - The Gap Analysis will demonstrate the solution applied during the initial analysis working sessions prior to project kick-off. Accela will perform Gap Analysis sessions against the solution for each identified record group. At the end of the Gap Analysis workshops, the core configuration will be completed to view and walkthrough the Accela Civic Platform solution during the Refine Conference Room Checkpoint. Report design, interfaces, business automation and data conversion will start after the Refine Stage Conference Room Checkpoint is complete.

1.2.4 Refine Stage Conference Room Checkpoint - At the end of gap analysis stage, Pinellas Responsible Expert will choose a User Story to be developed with the Accela team. Pinellas Responsible Expert along with the support of the Accela team will walk Pinellas through the User Story solution at a high-level on the Accela Civic Platform to provide a clear understanding of what has been built to date and demonstrate the Core functionality of the groupings has been realized.

1.2.5 Test Strategy Plan - The Accela Implementation Lead will create a Test Plan with participation from Pinellas to support the implementation; the Test Plan will focus on all testing in scope for this project which includes providing Pinellas with a plan to conduct UAT, who should participate, what should be tested, how to report an issue, and how to retest fixed issues. The plan is started during the refine stage and is completed and approved prior to user acceptance testing.

C. DEVELOP STAGE

There are six key deliverable tasks that occur in the Develop Stage

1.3.1 Automation and Validation - The package solutions will include automation and validation for each identified record group in this Stage; the automation and validation will support flexibility in Pinellas's development based on criteria to support the existing business rules.

1.3.2 Report Verification - The reports will support flexibility in Pinellas's development based on data and format to support the existing report. Accela will be responsible for development of the reports and forms. Pinellas will validate the reports and forms for accuracy and provide approval to Accela.

1.3.3 Data Conversion Iterative Mocks – Pinellas will map the legacy data to the Accela data fields using the Accela data mapping tool in order of the record type groupings, correcting mappings and cleaning the data quality after each

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mock run. Accela will perform the mock runs for each group. The time allocated to perform the mock runs will vary dependent on the size and complexity of each group.

1.3.4 Build Points of Integration - The Accela Technical Consultant will develop the code and perform unit testing on the interfaces that were designed in the Refine Stage. The Accela QA Analyst will create test cases, execute test scripts, and perform functional and full integration testing on the application. Pinellas will confirm the functionality during user acceptance testing.

1.3.5 Conference Room Checkpoint during the Develop Stage - Once the Configuration, Automation and Validation, Report Verification for each record type group, and the unit testing on the points of integration has been completed; the team will schedule a Conference Room Pilot during the Develop Stage covering an overview of Data Conversion and the Built Points of Integration of the developed solution. Each Conference Room Pilot Checkpoint meeting will cover the same record type groups covered during the Refine Conference Room Checkpoint. Accela will perform conference checkpoints for each identified record group before User Acceptance Testing begins.

1.3.6 Data Conversion Functional Mock - The Accela Technical Consultant will perform dry-runs of the full production data conversion run to validate all Accela data fields and all data required is being converted successfully. Pinellas will conduct data validation testing on all record type groupings by performing quality assurance spot checks on the data that has been mapped. Data validation testing consists of reviewing each data field, validating the data is accurate as defined within the data mapping specifications and conduct functional testing on converted data within required data fields to validate the function can be processed. Upon Accela's successful execution of the mock runs, Pinellas will provide approval that the data converted into the Accela Civic Platform is in alignment with the requirements.

D. DEPLOY STAGE

There are five key deliverable tasks occur in the Deploy Stage:

1.4.1 Execute User Acceptance Testing - Pinellas is responsible for executing UAT with Accela's support in troubleshooting and fixing reported issues. The Accela Test Lead will facilitate testing review meetings. Pinellas will triage defects submitted by their testing team and assign defects to Accela Test Lead. Accela will correct and retest all defect fixes prior to sending back for retest.

1.4.2 Conduct End User Training - Pinellas trainers will be responsible for end user training. The Accela team will provide train-the-trainer training to the assigned Pinellas trainers to prepare for end user training. The Accela train the trainer training will instruct the assigned Pinellas trainers on how the system will support the business process. Pinellas will review and approve the training plan content. Accela will provide the trainers.

1.4.3 Execute Cutover Plan – In partnership with Pinellas, Accela Solution Architect, Accela Project Manager and the Accela Implementation Lead will identify tasks that will need to support the cutover to production. The Cutover Plan will begin prior to the final mock run during the Data Conversion Functional Mocks and an Accela cutover plan template will be used to support the migration/conversion to production. Accela will provide with the template for review and will allow modifications tailored to the project as needed. Upon final review, Pinellas will provide an approval of the cutover plan.

1.4.4 Post Production Support – After production deployment, the Accela project team will provide services after go-live for the period set forth noted below.

1.4.5 Transition to Customer Support – The Accela Project Manager and the Accela Customer Support Manager will

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provide and execute a full transition plan from the project team to the support team. The Customer support team will provide production support services as defined within the SOW

CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, Pinellas must submit a written request to Accela specifying the proposed changes in detail. Accela shall submit to Pinellas an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services ("Change Order"). Accela shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees therefore. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order. If Accela's effort changes due to changes in timing, roles, responsibilities, assumptions, scope, etc. or if additional support hours are required, a change order will be created that details these changes, and impact to project and cost (if any). Any change order shall be signed by Accela and Pinellas prior to commencing any activities defined in the change order. The Change Order Template is attached hereto as Appendix B.

PROJECTS PUT ON HOLD

It is understood that sometimes Pinellas priorities are revised requiring Pinellas to place the Accela implementation on hold. Pinellas must send a formal written request sent to Accela in order to put the project on hold. A project can be on hold for up to 90 days without invoking the termination clause. This excludes delays longer than 90 days due to Natural Disaster emergencies that pull key staff from the project such as hurricanes. After that time, Accela can choose to cancel the rest of the Statement of Work. To finish the project will require a new Statement of Work at new pricing.

When a project is put on hold, at minimum, Accela will need to draft a Change Order to keep some of the Accela project manager's time engaged to monitor progress and to resource the project once it comes off hold. Other Change Order items may be needed as a result of the delay. When a project goes on hold, project resources will be re-deployed and Accela will need a forty-five (45) calendar day notice to re-staff the project. Resumption of the project will be dependent upon Accela resourcing timelines.

Should Pinellas become non-responsive to Accela communications for a term of 30 calendar days regarding continuance of the project work, Accela can choose to cancel the remainder of the Statement of Work. To finish the project will require a new Statement of Work at new pricing at the current rates.

WORK DESCRIPTION

The following section describes the specific activities and tasks that will be executed to meet the business objectives and business requirements of Pinellas. In support of the implementation effort as described above, Accela will provide the following detailed implementation services. For each deliverable, a description is provided as well as criteria for acceptance of the deliverable.

Project Stages and Deliverable Tasks - the following section describes the specific deliverables that will be executed to meet the business objectives and business requirements of the project. In support of the implementation effort as described above, Accela will provide the following detailed implementation services. For each deliverable, a description is provided as well as criteria for acceptance of the deliverable.

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STAGE 1: DEFINE

Deliverable 1: Project initiation

An opportunity to ensure the project starts in a well-organized, structured fashion while re- confirming Pinellas and Accela expectations regarding the implementation. This Deliverable is comprised of project planning activities, core project management documents and templates and the first on-site meeting conducted between Pinellas and Accela after the signing of the Statement of Work.

In conjunction with Pinellas representatives, Accela will perform the following tasks:

- Finalize staffing for the project teams. Guidelines and recommendations for Pinellas project
- Conduct a formal onsite Kickoff meeting. The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.
- Establish Communication Plan and project logistics including escalation, status reporting, issue/risk management, work locations, etc.
- Establish schedule of Steering Committee meetings
- Review and agree on Project Status Report Template
- Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from Pinellas and Accela.
- Finalize an integrated project plan that includes resource allocation for all tasks (in cooperation with Pinellas Project Manager).
- Develop a Project Charter that defines how the project will be governed, including a detailed escalation plan.
- Create the project SharePoint site and load all standard processes, trackers and current documentation.

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The Project Kickoff Meeting includes a formal presentation by the project team to review project objectives, methodology, timeline, roles and responsibilities, risks, and other key project elements with project stakeholders.

In terms of specific output, the following will be executed for this deliverable:

- Project Charter
- Baseline Project Plan
- Project Status Report Template
- Project SharePoint Site
- Project Kickoff Presentation

Accela Responsibilities:

- Provide timely and appropriate responses to Pinellas's request for information.
- Coordinate project planning activities.
- Communicate the Accela Implementation Methodology that will be used by Accela to deliver Services.
- Complete Baseline Project Plan, Project Status Report Template, and Project Kickoff Presentation deliverables with input from appropriate Pinellas resources and in collaboration with Pinellas Project Manager,

Pinellas Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.
- Provide timely and appropriate responses to Accela's requests for project planning input and meeting logistics requests.
- Provide meeting facilities for Project Kickoff and other onsite activities.
- Include Project Sponsor in Project Kickoff Meeting.

Acceptance Criteria:

- Review and acceptance of the Project Status Report Template
- Review and acceptance of the Baseline Project Plan
- Review and acceptance of the Project Charter
- Completion of the Project Kickoff Meeting
- Initial Core Team Training - Civic Platform Core Team Training – up to 2 days, 12 max attendees. This begins the knowledge transfer between Accela terminology and the gap analysis workshops overview

Deliverable 2: Accela Civic Platform Setup (Accela Cloud)

During the System Setup step of this project, Accela's technical staff will work with Pinellas IT staff to ensure that the components are in place for the Accela hosted test, development, staging and production environments. Accela technical staff will validate the proper installation and configuration of each Accela Civic Platform hosted environment. This Deliverable is defined as Pinellas County can verify that they can log into the SUPP and TEST hosted environments. The production environment will be provisioned right before go live.

In terms of specific output, the following will be executed for this deliverable:

- Accela Civic Platform software in two (2) hosted environments: SUPP and TEST
- Demonstration of an operational Accela Civic Platform environment

Specifically, Accela will perform the following tasks within the support environment:

- Perform a remote system check and monitoring.
- Demonstrate that the Accela Civic Platform is operational.

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Accela Responsibilities:

- Provide timely and appropriate responses to Pinellas's request for information.
- Consult with Pinellas resources to provide technical input and answer technical questions related to the hosted environments.

Pinellas Responsibilities:

- Provide timely and appropriate responses to Accela's requests for information.
- Make available the appropriate Pinellas key IT users to participate in any environment and infrastructure meetings.
- Arrange for the availability of appropriate people for the system setup, testing, and quality assurance throughout the setup process.

Acceptance Criteria:

- Confirmation of ability to log into the Accela Civic Platform software.

STAGE 2: REFINE

DELIVERABLE 3 - 8: REFINE CONFERENCE ROOM CHECKPOINT

Gap Analysis is comprised of the activities required to define the Accela Civic Platform Solution Foundation which serves as a 'blueprint' for design and baseline configuration efforts throughout the implementation project and establishes the benchmarks for testing and acceptance of the solution.

Accela will provide a template to collect required information for each record grouping in advance of beginning the Gap Analysis workshop sessions. The completed template should be submitted back to Accela no less than 2 weeks in advance of each Gap Analysis session workshop for Accela to review the requirements and begin constructing the baseline configuration that will be worked off of throughout the Gap Analysis sessions. Changes to the requirements and information documented in the template or failure to provide the template in advance of the working sessions will impact the project schedule and ability to conduct the Gap Analysis sessions efficiently.

The specifics for each deliverable will be discovered and documented later in the project as they are dependent on the completion of the Refine milestone. (**Example**: Discovery of a Report is documented during Stage 2: Refine, however, the specific report specification and requirements are completed in during Stage 3: Develop)

The Configuration Report will be developed by Accela based on the gap requirements gathered in the Gap Analysis Sessions. This will serve as the 'blueprint' for processes throughout the implementation project.

The purpose of the Conference Room Checkpoint in the Refine Stage is to validate the configuration at a point in time with users that were not part of the analysis activities. The key output of the process is Configuration Reports, which serves as a 'blueprint' for design and baseline configuration efforts throughout the implementation project and establishes the benchmarks for testing and acceptance of the solution. Pinellas's Person of Accountability (POA) for each group will partner with the Accela Project team walk the participants through an actual scenario(s) where the record would be created in the Online Portal (ACA) and demonstrate the steps to record/application/permit closure. The scenario should reference where interfaces, reports and automation are encountered based on the solution. It should be specified that not all reports, interfaces and/or automation will be demonstrated during the checkpoint. After the Refine Conference Room Checkpoint, Pinellas County will have 15 days to accept the configuration and this

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should allow for the exit criteria for the Refine Stage for the group.

In terms of specific output, the following will be executed for each Gap Analysis deliverable:

- Configuration Reports for each Gap Analysis Session

Accela Responsibilities:

- Work with Pinellas to execute the Gap Analysis Sessions.
- Document and configure identified Gaps.
- Complete the Configuration report for Pinellas review.

Pinellas Responsibilities:

- Provide subject matter experts for each Gap Analysis Session
- Provide suggestions on Gaps resulting from current business processes and Accela Best Practices
- Review and sign-off on completed Core Configuration document.

Acceptance Criteria:

- The Gap Analysis Sessions have been completed, identified Gaps have been configured and Pinellas approves the Core Configuration Document

Acceptance Review Period:

- Fifteen (15) business days total

STAGE 3 – DEVELOP

The Develop/Build stage includes data conversions, development of interfaces, development of all Business Process Validation and Automation (Event Manager Scripts and Expressions) configuration of add-on products and custom report development. It comprises all the additional activities outside of Gap Analysis that are required to complete the total solution. Like the Refine Stage, it is critical that appropriate Pinellas decision making representatives are involved in each step of the process to ensure success.

DATA CONVERSION ANALYSIS

Upon receipt of Pinellas's data, Accela will create a Data Conversion Mapping Document for each data conversion in scope for this project listed above, detailing the data conversion process, mutually agreed upon requirements and mapping of Pinellas's historical data into Accela Civic Platform.

The following data conversions are in scope for this project:

1. Permits Plus
2. Air Quality
3. Natural Resources Enforcement
4. Water & Navigation
5. Mangroves
6. Complaints
7. APO (Address, Parcel Owner)
8. Licensed Professional

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In terms of specific output, the following will be executed for each data conversion deliverable:

- Data Conversion Mapping Document

Accela Responsibilities:

- Work with Pinellas to define and document historical data elements that are required for the conversion.
- Facilitate the data analysis and mapping process
- Complete the Data Conversion Specifications Document.

Pinellas Responsibilities:

- Provide data in acceptable formats.
- Provide subject matter experts on the data source to aid Accela in identifying key components of the data
- Provide subject matter experts on the configuration of current system to aid in the data mapping process
- Review and sign-off on completed Data Conversion Specifications document.

Acceptance Criteria:

- The Data Conversion Specifications document identifies data elements that will be converted into Accela Civic Platform as well as document special consideration (ex. merging data sources, phasing, etc.)

Acceptance Review Period:

- Fifteen (15) business days total

Deliverable 9-17: DATA CONVERSION DEVELOPMENT

Upon Pinellas approval of each Conversion Specifications document, Accela will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. Upon receipt of the conversion from Accela, Pinellas DBA will load the data into the Test environment for validation.

In terms of specific output, the following will be executed for each data conversion deliverable:

- Completion of migrated data into Accela Civic Platform development or test environment for

Accela Responsibilities:

- Provide a program to migrate historical data into Pinellas's AA test database environment.
- Each data conversion will include up to five (5) conversion loads for client testing
- Validate the successful completion of the migration of historical data into Pinellas's test environment.

Pinellas Responsibilities:

- Providing the legacy data source in an accepted format
- Assist in the execution of the data conversion program and provide access to environments as needed
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform

Acceptance Criteria:

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- Historical data has been converted to Accela Civic Platform testing environment according to the Data Conversion Mapping document.

Acceptance Review Period:

- Fifteen (15) business days total

INTERFACES

The following system interfaces are in scope for this project:

1. Financials
2. Property Appraiser
3. Pinellas County Construction Licensing Board (PCCLB)
4. PayPal Payflow Payment Adapter
5. See-Click-Fix Interface Support
6. Selectron IVR Interface Support

For each interface, the Accela technical lead will work together with Pinellas's technical lead and business leads to document functional and technical requirements of the interface in an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected all interfaces will use Accela's GovXML, web services or batch engine. No custom or third-party integration tool will be used to accomplish input or output of data to/from the Accela system. In other words, data coming into Accela and data coming from Accela will use the existing integration technology. Pinellas responsibility includes obtaining permission for level/type of integration from appropriate application owners (including on premises or cloud/hosted, etc.). Further, Pinellas will ensure that Accela resources have access to a Dev or Test version of the 3rd party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd party system.

Deliverable 18: FINANCIALS INTERFACE

Accela will provide an interface between Accela Civic Platform and an Pinellas **Financial System Oracle E-Business Suite**. This interface will export fees paid in the Accela system to Pinellas's Financial System. In order to determine Pinellas requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of Pinellas's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. Accela will provide a program to integrate 3rd Party data **from** Accela Civic Platform **nightly**.

Accela Responsibilities:

- Provide timely and appropriate responses to Pinellas's request for information.
- Conduct Interface Analysis sessions for a nightly batch interface with Financial System.
- Work with Pinellas staff to develop interface specifications document.
- Use an Accela web service or other tool to implement the interface functionality based on the specifications.
- Build all aspects of the nightly batch interface that interact directly with the Accela Civic Platform.

Pinellas Responsibilities:

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- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with Financial System Data Source software to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd party system or Pinellas business processes.

Acceptance Criteria:

- Review and approve the Interface Specifications document.
- Demonstration and approval of the completed interface as per the requirements detailed in the interface specifications document. Pinellas will not withhold acceptance if Pinellas opts to complete the task using Pinellas or third-party resources.

Acceptance Review Period:

- Fifteen (15) business days total

DELIVERABLE 19: PROPERTY APPRAISER INTERFACE

Accela will provide an interface between Accela Civic Platform and the **Property Appraiser System**. This interface will export building permit data processed for the month in the Accela system to the Property Appraiser System. In order to determine Pinellas requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of Pinellas's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. Accela will provide a program to integrate 3rd Party data **from** Accela Civic Platform on a **monthly** basis.

In terms of specific output, the following will be executed for this deliverable:

- Interface Specifications Document
- Operational interface in the Development or Test environment

Accela Responsibilities:

- Provide timely and appropriate responses to Pinellas's request for information.
- Conduct Interface Analysis sessions for a monthly batch interface with Property Appraiser System.
- Work with Pinellas staff to develop interface specifications during configuration.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Build all aspects of the nightly batch interface that interact directly with the Accela Civic Platform.

Pinellas Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.

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- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Work with Property Appraiser System Data Source software to ensure data from Accela is in correct format.
- Updates to interface, post go-live, due to changes in 3rd party system or Pinellas business processes.

Acceptance Criteria:

- Review and approve the Interface Specifications document.
- Demonstration of the interface meeting the specific requirements detailed in the interface specifications document. Pinellas will not withhold acceptance if Pinellas opts to complete the task using Pinellas or third party resources.

Acceptance Review Period:

- Fifteen (15) business days total

DELIVERABLE 20: CONSTRUCTION LICENSING BOARD (PCCLB) INTERFACE

Accela will provide an interface between Accela Civic Platform and the **Construction Licensing Board (PCCLB) System**. This interface will import license expiration data from the PCCLB System to the Accela system. In order to determine Pinellas requirements for this interface, analysis sessions will be conducted as a portion of this deliverable. The findings will then be documented in the Interface Specifications Document for use by Accela in building the interface code. The implementation of the interface is dependent on the assistance of Pinellas's staff, specifically, interface analysis, data mapping, and data manipulation as required in the source system. Accela will provide a program to integrate 3rd Party data **to** Accela Civic Platform on a **daily** basis.

In terms of specific output, the following will be executed for this deliverable:

- Interface Specifications Document
- Operational interface in the Development or Test environment

Accela Responsibilities:

- Provide timely and appropriate responses to Pinellas's request for information.
- Conduct Interface Analysis sessions for a monthly batch interface with PCCLB System.
- Work with Pinellas staff to develop interface specifications during configuration.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Build all aspects of the nightly batch interface that interact directly with the Accela Civic Platform.

Pinellas Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Provide system and access to individuals to provide required details of system interface.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-

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house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Work with Third Party Data Sources to determine best methods of interfacing to Accela system.
- Validate interface through testing.
- Updates to interface, post go-live, due to changes in 3rd party system or Pinellas business processes.

Acceptance Criteria:
- Review and approve the Interface Specifications document.
- Demonstration of the interface meeting the specific requirements detailed in the interface specifications document. Pinellas will not withhold acceptance if Pinellas opts to complete the task using Pinellas or third party resources.

Acceptance Review Period:
- Fifteen (15) business days total

DELIVERABLE 21: PAYPAL PAYFLOW PAYMENT ADAPTER INTERFACE

Accela will develop an interface between Accela Civic Platform and the **PayPal PayFlow System** for electronic payments. Specifically, Accela will utilize/update the standard E-Payment adaptor to the PayPal PayFlow system for both **ACA (Accela Citizen Access) and the backend Accela Civic Platform**. It is assumed that all departments will be using the same version of the PayPal PayFlow system for payment processing.

In terms of specific output, the following will be executed for this deliverable:

- Interface Specifications Document
- Demonstration of operational interface between ACA and Accela Civic Platform and the PayPal PayFlow system in the development or test environment.

Accela Responsibilities:
- Provide timely and appropriate responses to Pinellas's request for information.
- Work with Pinellas staff to develop interface specifications with the specified version of PayPal PayFlow.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Assist Pinellas with testing and debugging of the interface.

Pinellas Responsibilities:
- Provide timely and appropriate responses to Accela's request for information.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specifications development and data mapping process.
- Review and approve the interface specifications document.
- Allocate the time for qualified personnel to test the interface for acceptance to ensure that the data populates successfully according to the interface specifications documents.
- Updates to interface, post go-live, due to changes in 3rd party system or Pinellas business processes.

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Acceptance Criteria:

- Review and approval of the Interface Specifications document.
- Demonstration of the interface meeting the specific requirements detailed on the interface specifications document. Pinellas will not withhold acceptance if Pinellas opts to complete the task using Pinellas or third party resources.

Acceptance Review Period:

- Fifteen (15) business days total

DELIVERABLE 22: SEE-CLICK-FIX INTERFACE SUPPORT

The See-Click-Fix (SCF) interface will be provided by SCF. Pinellas will work directly with SCF to define the specifications and deliverable goals. Accela will provide support and expertise to SCF and Pinellas for the deliverable of this interface. Accela has allocated 40 hours for this deliverable.

DELIVERABLE 23: SELECTRON IVR INTERFACE SUPPORT

The Selectron IVR interface will be provided by Selectron. Pinellas will work directly with Selectron to define the specifications and deliverable goals. Accela will provide support and expertise to Selectron and Pinellas for the deliverable of this interface. An estimate of 8 hours has been allocated for this deliverable.

DELIVERABLE 24 - 26: BUSINESS PROCESS VALIDATION & PROCESS AUTOMATION

During the build phase of the implementation project, Accela will identify opportunities to supplement the Accela Civic Platform base functionality via Event Manager Script Engine (EMSE) script development. Accela will work with key Pinellas project stakeholders to identify the business rules/processes to be automated. Accela will work with Pinellas to identify desired EMSE functionality, and subsequently will help prioritize the scripting needs to determine which scripts will be developed by Accela, and which scripts can be developed by Pinellas. The scripts developed by Accela can be used as models whereby Pinellas staff can develop and modify additional EMSE scripts as needed. An estimate of 700 hours has been allocated for Business Process Validation and Automation.

Representative examples of business processes that could be automated by a script listed below. Note that the below list is an example list only and not a list of the actual script(s) that will be developed for the project.

- Closing workflows based on inspection results
  - Use Case: Final Inspection is complete, update workflow;
- Automatic assessment of complex fee calculations
  - Use Case: Auto fee calculation, assessment, and invoicing upon application submittal;
- Increment a date based on workflow status change
  - Use Case: Expiration on Permit is made current every time a workflow is updated;
- Preventing inspections based on various criteria
  - Use Case: Depending on workflow / application status, do not allow an inspection to take place.

Prior to the development of a script, Pinellas will approve a design specification document that will be created jointly by Pinellas and Accela. The approved document will be used as a basis for determining completion and approval of the deliverable.

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In terms of specific output, the following will be executed for this deliverable:

- (a) Prioritized list of requirements that require Automation
- (b) Specification documents for each required Automation
- (c) Demonstration of completed Automations in development or test environments per the specifications document(s)

Accela Responsibilities:

- Work with Pinellas staff to identify potential uses of EMSE scripting.
- Assist with development of list of desired EMSE functionality.
- Aid Pinellas in prioritizing which scripts will be developed by Accela.
- Develop EMSE scripts based on the specifications.
- Demonstrate functionality of scripts per specifications.

Pinellas Responsibilities:

- Allocate the time for qualified business and technical experts for the script requirements sessions that are critical to the project success.
- Identify resources that will learn EMSE scripting tolls and approaches for ongoing maintenance.
- Prioritize desired EMSE functionality to determine which scripts Accela will develop.
- Provide timely and appropriate responses to Accela's request for information.
- Verify the Event Script Specification meets the intended business requirement.
- Allocate the time for qualified personnel to test the script for acceptance.
- Ensure that the data populates successfully according to the script requirements document.

REPORTS

Reports are defined as anything that can be printed from the system, including but not limited to, reports, forms, documents, notices, and letters that Pinellas wishes to print as identified during configuration analysis. The Configuration Document will define the reports and documents that are required by Pinellas to effectively use Accela Civic Platform. These reports will be broken down by level of effort and identified in the configuration document. It is expected that, after the appropriate training on the database and the selected report writing tool is completed, Pinellas personnel will be able to handle additional and future report requirements. Reports are classified

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by level of effort: high, medium, and low. High is defined as a report containing significant calculation and/or extensive detail and number of fields – for example a financial statistical report or complex permit. The majority of reports require a 'medium' level of effort, which is defined as a report displaying non-calculated and minimal calculated data fields. Reports with a low level of effort are typically letters or notices that contain contact information and basic application data.

These reports can be developed using the integral Accela Report Writer included with Accela Civic Platform, Microsoft Report Service (SRS) or Crystal Reports XI Server at Pinellas's discretion. These custom reports, whether developed with Accela Report Writer, SRS or Crystal Reports, will be deployed in the Report Manager for use within Accela Civic Platform.

DELIVERABLE 27 & 28: REPORT VALIDATION AND SPECIFICATIONS

Accela will develop documents/letters/reports from those identified by Pinellas as required for the new system. Accela and Pinellas have agreed that Accela will develop reports based on the following breakdown:

- 8 number of High Complexity
- 14 number of Medium Complexity
- 8 number of Low Complexity

Prior to the development of a report Pinellas will approve report design specification documents that will be created jointly by Pinellas and Accela. The approved documents will be used as a basis for determining completion and approval of the reports. Development of each report cannot begin until agreement on each specification is complete.

A proven strategy that combines the use of the Accela Civic Platform Quick Queries, custom reports developed by Accela that include run-time parameters to allow similar reports to be combined, and the development of other reports by Pinellas after training, can ensure that all required reporting requirements are met.

In terms of specific output, the following will be executed for this deliverable:

- (27) List of identified reports with assigned responsibility for specification and development
- (28) Completed Report Specification Documents for each report assigned to Accela

Accela Responsibilities:

- Assist in determining level of effort for reports to assist with prioritization.
- Develop report specifications.

Pinellas Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate key users and content experts to participate in the report specification.
- Provide information and data in the formats specified by Accela that will be needed for agreement on the Deliverable.

Acceptance Criteria:

- Agreement on prioritized list of reports that will be developed by Accela.
- Review and approval of individual Report Specifications documents. Pinellas will not withhold acceptance if Pinellas requests changes to the reports specifications after the initial signoff of the specification by Pinellas.

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- Pinellas will have 10 business days to review the Report Specification Documents. If no changes or comments are requested within the 10 days, the Report Specification Documents are considered approved by Pinellas.

DELIVERABLE 29: REPORT DEVELOPMENT

Accela will develop custom documents/letters/reports per the specifications developed and approved in Deliverable 6.1 Report Specifications. Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by Accela to determine the level of effort required, and if a change order would be required to complete the work.

In terms of specific output, the following will be executed for this deliverable:

- A total of 30 documents/letters/custom reports per the Report Specification Documents

Accela Responsibilities:

- Provide timely and appropriate responses to Pinellas's request for information.
- Develop reports per specifications.
- Assist in the validation of the reports in test environment.

Pinellas Responsibilities:

- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate key users and content experts to participate in the report development and validation activities.
- Request change order if changes to specifications are required.

Acceptance Criteria:

- Confirmation of report accuracy in the development or test environment per Report Specifications.

DELIVERABLE 30: ACCELA GIS CONFIGURATION

Accela will install and configure Accela GIS to link and leverage existing Pinellas GIS information, including assistance with establishing the map service to be used in conjunction with Accela GIS. The following are the main objectives being pursued through the implementation of the Accela GIS:

- Look up permit information and parcel information from the Permitting system.
- View selection, location, and associated GIS information.
- Select one or more parcels and add new applications to the permit system.
- Auto-populate spatial attributes for a property in forms (including ACA).
- View permits, enforcement, inspections, zoning, land use, etc.
- Graphically display these items (spacially arranged) by parcel ID, address, and zones
- Search by attribute
- Eliminate duplicate data (define system of record for each data type)
- View districts: fire districts, water, sewer, etc.
- Analyze trends
- Track parcel splits and combines and rights of way vacations from the Property Appraiser (need business process)

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- Chronology:
  - Non-spacial information in Accela Civic Platform
  - Spatial information in GIS (Note: mapping only incorporates current information)
- Mobile capabilities:
  - Online and Offline
  - Ability to redline
  - GPS integrated into tablets

During GIS installation, Accela's technical staff will work with Pinellas IT staff to ensure that the components for hardware, software, database, network, and Internet are in place for the Accela GIS test and production environments. Accela technical staff will validate the proper installation and configuration of the Accela GIS environment.

In terms of specific output, the following will be executed for this deliverable:

- Accela GIS installed on Pinellas server(s)
- 3 Proximity Alerts
- 6 Dynamic Themes
- 3 Attribute Mapping

Accela Responsibilities:

- Install Accela software and perform quality assurance checks on the configuration and performance based on acceptance criteria mutually developed by Accela and Pinellas.
- Demonstrate that the Accela GIS applications are operational in Pinellas computing environment thus communicating with the Accela Civic Platform system.
- Assist Pinellas in identifying and developing Proximity Alerts and Dynamic Themes

Pinellas Responsibilities:

- Arrange for the availability of appropriate staff for the system installation, setup, testing, and quality assurance throughout the setup process.
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified by Accela.
- Provide people and physical resources based on the dates outlined in the project schedule.
- Prepare the hardware, software, and network in accordance with the specifications provided by Accela.
- Provide Accela with network access for remote installation and testing.
- Provide information and data in the formats specified by Accela that will be needed for the GIS implementation.

Acceptance Criteria:

- Demonstration of operating Accela GIS in test environment.

DELIVERABLE 31: ACCELA CITIZEN ACCESS CONFIGURATION

This deliverable includes setup and configuration of Accela Citizen Access (ACA) on Pinellas Dev or Test site. Accela will work with Pinellas representatives to assess and implement Accela Citizen Access to extend certain aspects of the internal Accela Civic Platform configuration for use by the general public.

Features available for configuration include:

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(Permit/License/Complaint/Cases) Research

- Permit Application and Issuance
- License Renewals
- Inspection Request Entry
- Inspection Results Research
- Status tracking

In terms of specific output, the following will be executed for this deliverable:

- Accela Citizen Access Configuration Specifications Document (MS Word)
- Configuration of Online Record types in Accela Civic Platform
- Accela Citizen Access Admin Training

Accela Responsibilities:

- Setup Accela Citizen Access in Dev and Test environments.
- Assist Pinellas in set up and validation of merchant account integration.
- Work with Pinellas to determine which services to expose to the public via Accela Citizen Access.
- Create configuration specification for Accela Citizen Access based on analysis with Pinellas.
- Configure the Online Record types defined in the System Configuration Document in Accela Citizen Access.

Pinellas Responsibilities:

- Obtain a merchant account, and deploy an internet-enabled payment engine.
- Validate that the configuration specification for Accela Citizen Access meets Pinellas requirements based on details from the Configuration phase of the project.
- Perform testing of all Online Record types for purposes of validating the configuration.

Acceptance Criteria:

- Accela Citizen Access Configuration Analysis Document provides details of all configuration elements based on Accela Civic Platform back office configuration.
- The base configuration of Accela Citizen Access is configured as documented in the approved Accela Citizen Access Configuration Specification Document.
- Demonstration of the operational Accela Citizen Access functionality per the specification document(s).

Acceptance Review Period:

- Fifteen (15) business days

DELIVERABLE 32: ACCELA MOBILE OFFICE CONFIGURATION

Accela will configure the Accela Mobile Office application. As part of this deliverable Accela will perform the configuration tasks required to ensure Accela Mobile Office interfaces with Accela Civic Platform in both a test and production environment. Using Accela Mobile Office, an Pinellas inspector can perform activities such as:

- Result inspections/investigations in either store/forward or wireless mode
- Print reports in the field

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Analysis activities with Pinellas will result in a Mobile Office Configuration Specifications Document. Subsequently, Accela's staff will extend base configuration of Accela Mobile Office per the Mobile Office Configuration Specifications Document.

In terms of specific output, the following will be executed for this deliverable:

- Accela Mobile Office Configuration Specifications Document
- Demonstration of operation system per Accela Mobile Office Configuration Specifications Document
- Accela Mobile Office Admin Training

Accela Responsibilities:

- Create configuration specifications for Accela Mobile Office based on analysis with Pinellas.
- Configure Accela Mobile Office based on approved specifications document.

Pinellas Responsibilities:

- Validate that the configuration specification for Accela Mobile Office meets Pinellas requirements based on details from the Configuration Specification Document.
- Perform testing to validate the configuration.

Acceptance Criteria:

- The base configuration of Accela Mobile Office in the Development or Test environment is configured as documented in the Accela Mobile Office Configuration Specifications document.

Acceptance Review Period:

- Fifteen (15) business days total

DELIVERABLE 33: ACCELA ELECTRONIC DOCUMENT REVIEW CONFIGURATION

This deliverable is comprised of the activities that will enable the submission, review and markup of documents to work effectively given Pinellas's configuration. Accela will leverage stamps provided out-of-the box, or from its stock of stamps, and provide instruction on the creation of stamps to Pinellas. Pinellas will be responsible for creating any additional stamps that will be applied through configuration. Accela will also leverage buttons provided out of the box and provide training and instruction on the creation of custom buttons with links. Pinellas will be responsible for creating any buttons that will be applied through configuration. Accela will work with Pinellas to identify and review:

- Documents that will be submitted online through Accela Citizen Access and Accela Civic Platform as part of the review process.
- Pinellas workflows associated with the document review process.
- Requirements for workflow tasks I statuses I assignments for each role (e.g. intake personnel, plan reviewers, plan processors approvers, etc.) in support of Pinellas workflow.
- Versioning of documents submitted / reviewed.
- Process steps within Pinellas's workflow associated with reviewing the plan.
- Requirements for notifications via email.
- Stamps to be used on submitted documents.
- Buttons to be used to quickly access Web-based regulatory codes.
- Information that will be exposed to the public via Accela Citizen Access.

In terms of specific output, the following will be executed for this deliverable:

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- Accela Electronic Document Review Specification Document (MS Word)
- Configuration of Accela Electronic Document Review

Accela Responsibilities:

- Install Accela Electronic Document Review on up to 10 client PC's and train Pinellas so they can install on additional PC's.
- Provide one custom stamp for each of these categories; static text, simple dynamic stamp and dynamic stamp with input for the purposes of training.
- Provide one sample custom button for the purposes of training

Pinellas Responsibilities:

- Pinellas will have installed .Net Framework 4.0 Client Profile and Adobe Acrobat Pro software. Adobe Acrobat Pro must be purchased and installed separately for each Pinellas user who will be interacting with Accela Electronic Document Review for plan review and markups.
- Make available the appropriate subject matter experts to provide needed information, participate in the analysis and verify the accuracy of the information provided.
- Creation of additional Adobe activities (stamps and buttons)
- Provide timely and appropriate responses to Accela's request for information.

Acceptance Criteria:

- Accela Electronic Document Review Specification Document provides details of all configuration elements based on Accela Civic Platform back office configuration.
- Demonstration of the operational Accela Electronic Document Review functionality per the specification document(s).

Acceptance Review Period:

- Ten (15) business days

STAGE 4 – DEPLOY

After all develop work has been completed, the system is ready for User Acceptance Testing (UAT), End User Training and Go-Live activities. Pinellas will prepare for UAT and lead the UAT activities by executing test cases to validate the system is performing processes defined during the Gap Analysis workshops and the Accela team will support bug fixes as they are identified. At the completion of UAT, Pinellas will conduct End User Training and Pinellas and Accela will begin to execute the cutover plan.

Once training has completed, the cutover plan will be executed and Pinellas will go-live on their Accela Solution. Accela will support Pinellas in production for a time boxed transition period. Then the Accela team will transition Pinellas over to the Accela Customer Support team for on-going support.

DELIVERABLE 34: TRAINING STRATEGY

The objective behind developing the Training Strategy document is to create for Pinellas County a clear understanding and agreement about the scope and basic direction of the learning approach. The strategy document answers all training related questions like participants, training scope, schedule, delivery methods, etc.

- Accela shall provide comprehensive training to ensure that the County's staff can effectively use and maintain the system during configuration and after go-live.
- Such training shall include technical, functional, and end-user education on all aspects of the new Accela Civic

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Platform application.

- This would also include providing technical training to County staff on the configuration and installation of the system.
- Training plans for technical staff can include a combination of training by the vendor and third parties including industry standard certifications.
- Accela shall provide end user training which must be "role-based" and process-driven, tailored to accommodate the County's (job specific) use of the application, rather than generic module product training.
- The County expects a hybrid approach that combines a "train-the-trainer" approach along with onsite user training classes led by Accela's staff.

Training topics, class makeup, size, timetables, and training tools should be part of the formal Training Plan deliverables.

DELIVERABLE 35: ADMINISTRATIVE AND TECHNICAL TRAINING

Accela will provide training for Pinellas staff that focuses on the administration, maintenance, and augmentation of its Accela Civic Platform configuration. Our aim at Accela is to educate Pinellas resources on all aspects of Accela Civic Platform in an effort to ensure Pinellas is self-sufficient. This allows Pinellas to best react to changing requirements and ongoing maintenance, which can allow Pinellas to be reactive and significantly reduce system maintenance costs over time.

In terms of specific output, the following will be executed for this deliverable:

- 1 Core Team (Overview) Training – 2.5 days (20 hrs.)
- 1 Accela Civic Platform Administrator Training – 3 days (24 hrs.)
- 1 Admin Self-Hosted Training – 1 day (8 hrs.)
- 1 EMSE (scripting) Basic Training – 1 day (8hrs.)
- 1 EMSE (scripting) Advanced Training – 2 days (16 hrs.)
- 1 Report/Database Schema Training – 1 day (8hrs.)
- 1 ACA Admin Training – 1 day (8hrs.)
- 1 V360 Admin (Console) Training – 2 days (16 hrs.)

Accela Responsibilities:

- Coordinate with Pinellas to define training schedule and logistics.
- Deliver training per the specific requirements
- Deliver any and all documentation pertaining to the training courses noted above.

Pinellas Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently participating in training end users.
- Participate in the development of training schedules and identification of appropriate users.
- Provide suitable Pinellas facilities to accommodate various training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Execution of training courses

Upon mutual agreement, the final Training Plan will be modified to reflect the County specific roles and responsibilities.

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DELIVERABLE 36: TRAIN THE TRAINER

This Deliverable includes the Delivery by Accela of a 5-day "Train-the-Trainer" course. Accela best practices have proven that class sizes no larger than 7 participants are more successful with students who meet the pre-requisites of the course. The Accela Trainer will work with Pinellas if a class size needs to be modified to ensure a successful instruction outcome.

End User Training should be coupled with Pinellas delivering supplementary user training to its staff using the core Use Cases documented in each To-Be Analysis Document. Accela recommends Pinellas adopt the "80/20 rule" for training, focusing the majority of their training on 80% of what Pinellas normally does operationally. The recommended supplementary training conducted by Pinellas can utilize business experts from each area to train on all aspects of their configuration. Accela will deliver current and comprehensive training documentation in a format that can be customized by Pinellas.

In terms of specific output, the following will be executed for this deliverable:

- Accela on-site instructor-led 5 day Train-the-Trainer course sessions delivered per the agreed-to schedule.

Accela Responsibilities:

- Coordinate with Pinellas to define training schedule and logistics.
- Provide 5 day Train-the-Trainer course sessions.
- Perform post-training evaluation(s) to ensure Pinellas staff has the necessary information to perform their train-the-trainer duties.

Pinellas Responsibilities:

- Identify Pinellas resources who will receive the training and who have the skills to perform as "trainers", if required.
- Provide a training room at Pinellas facilities to conduct the training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Execution of 5 day Train-the-Trainer course sessions and verification that individuals have the information required to perform their train-the-trainer duties.

DELIVERABLE 37: ADDITIONAL TRAINING SUPPORT

In addition to the courses listed Administrative and Technical Training, and the Train-the Trainer, Accela understands the need for Pinellas to have additional flexible support to address the training needs. To this end, Accela will provide a total of 80 hours / 10 days of additional training support. The effort identified in this deliverable can be utilized by Pinellas in a flexible manner. Accela resources can provided augmented Admin training, or could participate and co-train any and all departments or groups identified by Pinellas.

In terms of specific output, the following will be executed for this deliverable:

- 80 hours / 10 days (hours/days) of additional training support provided by Accela delivered as augmented Admin Training or participating in the delivery of training to Pinellas departments.

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Accela Responsibilities:

- Coordinate with Pinellas to define training schedule and logistics.
- In conjunction with Pinellas, identify how best utilize the training support.
- Provide all training sessions identified as part of this deliverable.

Pinellas Responsibilities:

- Coordinate with the Accela to define training schedule and logistics.
- In conjuction with the Accela, identify how best utilize the training support.
- Provide a training room at Pinellas facilities to conduct the training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Execution of 80 hours / 10 days (hours/days) of additional training support.

DELIVERABLE 38: USER ACCEPTANCE TESTING (UAT)

This deliverable is comprised of the assistance Accela will provide to allow Pinellas to accept that the solution meets the requirements as documented in all the deliverables. Accela will assist Pinellas in the testing and validation of the solution and its readiness to be migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

Accela will provide support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that Pinellas devote ample time and resources to this effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by Pinellas, and coordination of resources is critical. At this point in the implementation process, Pinellas should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Civic Platform solution are operating properly (i.e., integration testing).

Accela will provide assistance to Pinellas as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. Accela will address and rectify issues discovered during the UAT process as Pinellas staff executes testing activities. Accela will work with Pinellas to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing. It should be noted that Accela will plan for a total of 8 weeks to complete this deliverable.

If Pinellas does not devote adequate time and staffing to UAT in order to completely test the solution, Accela may opt to postpone go-live at Pinellas's expense. Accela will work diligently with Pinellas to ensure this does not occur and provide several opportunities for Pinellas to add additional staff and time to this effort before recommending a postponement or delay.

In terms of specific output, the following will be executed for this deliverable:

- Resolution of issues resulting from Pinellas User Acceptance Testing
- Fully tested system that is ready to move to production for go-live

Accela Responsibilities:

- Provide recommendations on testing strategy and best practices.

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- Lead Pinellas in up to 8 weeks of User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.
- A mutual agreed upon formal User Acceptance Testing Plan will be developed and executed

Pinellas Responsibilities are defined by roles:

A mutual agreed upon formal User Acceptance Testing Plan will be developed and executed

Sponsors/Business Owners

- Identify and create test cases/scripts
- Identify and create test scenarios
- Identify and list data to be used for the test scenarios
- Assist the Test Coordinator with assessing all reported issues and indicate if the failure is due to data, system configuration, business process, or user error
- Determine priority/business impact for each issue

- Testers/SME's/End-Users (Extended Team Members)
  - Execute test scripts and/or scenarios as defined on each Test Script Form
  - Note results of each test on the Test Script Form
  - Indicate if the test passed or failed
  - Capture all the required information related to an issue
  - Submit completed Test Script Form to the Test Coordinator

- Test Coordinator
  - Administer test schedule according to Test Plan
  - Schedule and track end-user participation
  - Explain the test participation responsibilities to testers as needed to maintain consistency
  - Maintain sign-in/sign-out sheet for testers
  - Provide/assign test scripts to testers
  - Manage end-to-end staging of test scripts to ensure testing activities are executed in the right order (where necessary) to exercise dependencies within the business processes and/or system functionality
  - Assist testers as needed
    - Manage login setup/access for testers
    - Resolve any log on issues
  - Manage any technical issues with computers in testing room
  - Obtain assistance from other project resources as needed
  - Review/record test results on the UAT Tracking Spreadsheet
  - Record all reported issues and indicate if the failure is due to data, system configuration, business process, or user error (based on the collaborative assessment with the Sponsors/Functional Leads)
  - Transfer issues into the SharePoint Testing Issues Log
  - Ensure sufficient information is recorded for each issue
  - Record the priority/business impact for each issue (as determined by the Sponsors/Functional Leads)
  - Communicate/escalate major issues
  - Produce a daily test status report
  - Work with Accela on scheduling fixes
  - Reschedule failed test scenarios/cases

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Acceptance Criteria:

- Completion of up to 8 weeks of UAT

DELIVERABLE 39: PRODUCTION SUPPORT

Production date is defined as the official date in which Accela Civic Platform moves from the test environment to production for daily Pinellas usage. This date will be agreed to by both Accela and Pinellas at project inception. It may be altered only by change order agreed to by both parties. In the weeks prior to moving to Production, Accela will assist in final data conversions, system validation, staff preparation assistance and training, and coordination of deployment.

In terms of specific output, the following will be executed for this deliverable:

- Deployment support prior to moving to Production
- Setup of Integration points in Production
- Final Conversion run during cutover
- Accela Civic Platform used in Production environment for Pinellas daily use

Accela Responsibilities:

- Provide on-site resources to support the move to Production effort.
- With assistance from Pinellas, lead the effort to transfer the system configuration and any required data from Support to Production.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.

Pinellas Responsibilities:

- Provide technical and functional user support for pre- and post-Production Planning, execution, and monitoring.
- Provide timely and appropriate responses to Accela's request for information.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.
- Make available the appropriate Pinellas key users and content experts to participate in user acceptance testing as defined and managed by Pinellas.

Acceptance Criteria:

- Deployment support prior to moving to Production.
- Production system is first used by Pinellas for daily use.

DELIVERABLE 40: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC

This deliverable is comprised of the post- Production support assistance that Accela will provide to address issues and provide consultative advice immediately following the move to Production for daily use. Accela will provide support for 4 weeks immediately following deployment (go-live).

Accela will work with Pinellas to identify and address issues identified during this period using a Post Production Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by Accela, as well as any other issues that Pinellas wishes to track (not Accela Responsibility).

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Examples of issues Pinellas is responsible for include training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and procedures related to the use of Accela Civic Platform. Specifically, Accela will not be developing or creating additional reports, conversions, interfaces, records types and workflow processes that were not included in the scope of this project.

At the end of the support period, Accela will provide a final a final copy of the issue tracker to the customer and disable the list. Additionally, a formal meeting will be scheduled with Pinellas, Accela Services Team, and Accela CRC for the purpose of transitioning support of future issues and question from Pinellas to Accela CRC.

In terms of specific output, the following will be executed for this deliverable:

- 4 weeks of Post Deployment Support, Accela will resolve *all* Post Deployment issues before transitioning to their CRC support group.
- Finalized post production issues list
- Transition of Pinellas from Services team to Customer Resource Center for ongoing support

Accela Responsibilities:

- Provide post-production support for Accela developed configuration and components.
- Assist with the identification of issues for the Post Production Issues List.
- Assist with issues that may arise related to the deliverables in this SOW.
- Transfer ongoing support of the client and to the CRC to address any post Production issues that require remediation when agreed to by Pinellas and Accela.

Pinellas Responsibilities:

- Provide technical and functional user support for post-production support and monitoring.
- Pinellas and Accela will develop and maintain one Post Production Issues List.
- Provide timely and appropriate responses to Accela's request for information.
- Make available the appropriate Pinellas key users and content experts to participate in user acceptance testing as defined and managed by Pinellas.

Acceptance Criteria:

- Execution of 4 weeks post-Production support.
- Official transfer from the Accela Services project team to the Customer Resource Center (CRC).

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PAYMENT TERMS

PAYMENT SCHEDULE

Accela will perform the Services on a GSA Not to Exceed payment basis. The project is expected to take 8,929 hours and Accela's total price to perform the Services and provide the Deliverables described in this document is estimated to be $1,701,956.69 exclusive of taxes and expenses.

The price is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. Accela shall not exceed the total estimate amount without the prior approval of Pinellas and shall not continue to provide services, after the total estimate has been reached, without the prior authorization of Pinellas. Invoices will be sent after completion and approval of each deliverable described in the deliverable schedule below.

Any hours remaining on the project when Accela has completed the scope of this project will not be used for other work without a Change Order delineating the scope. Any hours remaining will expire on the SOW End Date.

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DELIVERABLE PAYMENT SCHEDULE

Estimated effort and costs are specified in the Delivery Summary below:

#	Deliverable Summary	Cost
1	Project Initiation (includes Gap Analysis) *	$ 48,796.16
2	Accela Civic Platform Setup (Accela Cloud) *	$ 34,309.80
3	Refine Group A - Conference Room Checkpoint	$ 111,824.53
4	Refine Group B - Conference Room Checkpoint	$ 111,824.53
5	Refine Group C & D - Conference Room Checkpoint	$ 111,824.53
6	Refine Group E - Conference Room Checkpoint	$ 111,824.53
7	Refine Group F & G - Conference Room Checkpoint	$ 111,824.53
8	Refine Group H - Conference Room Checkpoint	$ 111,824.53
9	Permits Plus Data Conversion Development	$ 38,122.00
10	Air Quality Conversion Development	$ 22,873.20
11	Natural Resources Enforcement Conversion Development	$ 22,873.20
12	Water & Navigation Conversion Development	$ 22,873.20
13	Mangroves Conversion Development	$ 22,873.20
14	Complaints Conversion Development	$ 22,873.20
15	External Address Parcel Owner (XAPO) Development	$ 20,967.10
16	Licensed Professional Conversion Development	$ 20,967.10
17	ApplicationXtender Conversion Development	$ 38,122.00
18	Financials Interface	$ 22,873.20
19	Property Appraiser Interface	$ 22,873.20
20	Construction Licensing Board (PCCLB) Interface	$ 22,873.20
21	PayPal PayFlow Payment Adapter Interface	$ 22,873.20
22	See-Click-Fix Interface Support	$ 7,624.40
23	Selectron IVR Interface Support	$ 1,524.88
24	Business Process Validation List	$ 33,356.75
25	Business Process Specifications	$ 33,356.75
26	Business Process Validation and Automation	$ 66,713.50
27	Report Validation List	$ 30,688.21
28	Report Specifications	$ 30,688.21
29	Report Development	$ 76,244.00
30	Accela GIS Configuration	$ 29,735.16
31	Accela Citizen Access Configuration	$ 34,691.02
32	Accela Mobile Office Configuration	$ 24,398.08
33	Accela Electronic Document Review Configuration	$ 22,873.20
34	Accela Civic Platform Setup - Production	$ 11,436.60
35	Administrative and Technical Training	$ 41,743.59
36	Train the Trainer	$ 32,403.70
37	Additional Training Support	$ 15,248.80
38	User Acceptance Testing (UAT)	$ 76,244.00
39	Production Support	$ 30,497.60
40	Post Deployment Support and Transition to CRC	$ 24,398.08

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	Total Estimated Services (Excluding Travel)	**$ 1,701,956.69**
	Travel and Expenses	**$160,000.00**
	Total Services and Expenses	**$ 1,861,956.69**

*** Work is complete and will be invoiced via the original contract and SOW Version 1.7.6 dated February 21, 2017.**

EXPENSES

Actual amounts of any reasonable and customary travel expenses incurred during the performance of services under this SOW will be billed to Pinellas, according to current GSA expense policy. Carahsoft will bill Pinellas for actual expenses incurred for travel and lodging/living, as well as other approved out-of-pocket expenses (such as mileage, parking, tolls and telecommunications charges, etc.). Accela will work with Pinellas to manage and control its expenses in accordance with GSA's travel policy guidelines and will not incur expenses in excess of the initial contracted budget below without Pinellas's prior written consent. Expense receipts will be made available as requested by Pinellas. The Accela PM and Pinellas PM will set mutually agreed upon thresholds (following GSA guidelines) for such line items as: nightly hotel rates, airfare rates, etc. If any project team members travel is required to exceed those thresholds at any time, the Accela PM and Pinellas PM will mutually be required to approve such travel costs prior to project team members booking that travel. Total estimated expenses are based on past Accela engagement experience, the travel expense budget estimate is $**160,000**

CONTRACT SUM

The total amount authorized under this Agreement for Services and Expenses is **$ 1,861,956.69** *therefore excluding taxes if applicable.*

PROJECT ASSUMPTIONS

- Pinellas and Accela will review their responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Pinellas shall provide the necessary tools, accounts, and permissions that will enable Accela to access Pinellas's internal network for remote installation and testing. This access must be provided through industry standard tools such as Virtual Private Network (VPN). Failure to provide this access in a timely fashion will result in a project delay. Such a delay will result in a Change Order.
- Pinellas agrees during the Initiation Phase of the project to assign a single designated approver for each major project deliverable. The designated approver will be responsible for overseeing and/or directly participating in the design and development, as well as the approval, of the deliverable. Pinellas may make changes to designated approvers with written notification to Accela a minimum of one month before a deliverable is due.
- Pinellas will provide work space for Accela Services for work completed on Pinellas premises.
- Accela will implement the most current version of Accela Civic Platform at the time of the contract signing. If Pinellas chooses to upgrade the system, additional costs will be incurred and managed via a Change Order.
- Pinellas will maintain primary responsibility for the scheduling of Pinellas employees and facilities in support of project activities.
- Pinellas will ensure that Accela resources have access to a Development or Test version of the 3rd party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd party system.
- Pinellas will provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support all required Accela software products in both support/testing and production environments as defined in the project schedule.
- For use with Accela Citizen Access, Pinellas will provide/purchase/acquire an online merchant account and

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all related hardware required by the merchant account provider for the handling of credit cards and/or checks.

- Pinellas is responsible for proper site preparation, hardware, software, and network configuration in accordance with Accela specifications.
- Accela will be responsible for implementing a functioning version of the application software at Pinellas (assuming Pinellas has installed the proper hardware, software, and networking devices).
- Accela will provide Pinellas with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, the resources needed to complete the tasks, a current version of the project plan, and a listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates).
- Pinellas will provide Accela with access to test and development environments for each Pinellas system that requires integration with Accela Civic Platform.
- Accela personnel will attend Pinellas executive steering committee meetings as needed.
- Pinellas has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in the project plan associated with this SOW.
- The project schedule is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, Accela and Pinellas will escalate according to the Communication Plan in the Project Charter.

DEFECT SEVERITY DEFINITION

An issue is considered an Implementation Defect when the software is not behaving as per the approved software version (Build stage complete). Data Conversion issues are considered Implementation Defects if the data was available in the proper format via the source data file but is not converted as defined in the approved Data Mapping document and as executed in the previously-approved final mock run.

Severity Level	Description
Critical	This is a “must fix” problem, a “showstopper.” The problem is causing a major system error, fatal error, serious database corruption, serious degradation in performance, major feature malfunction, or is preventing a major business goal from being realized. The problem does not have a workaround that is reasonably acceptable to the corresponding end-users. a. Examples: i. The Address, Parcel, Owner search is not returning any results which means an Applicant or Staff cannot submit a record because the Parcel is required and requires validation with Pinellas’s GIS system ii. An error is displaying when trying to select the submit button during Intake which is preventing the Record from being created. The error message is not providing any direction to the user other than contact your system administrator. iii. The Payment Interface is down which would not allow the online records from being created and the back-office staff would not be able to proceed with workflow due to business rules preventing the advance of workflow if there are outstanding fee due.
High	This is a problem that is causing significant loss of feature functionality but the system can recover from the problem and it does not cause total collapse of the system. The system does not meet a business goal or a portion of a business goal; performance degradation is minor, but not within established exit criteria; or minor database issues may exist (e.g., single rows or fields may be locked). The problem does have a workaround that is reasonably acceptable to the corresponding end-users. a. Examples:

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Severity Level	Description
	i. Fees are wrongly being applied to records based on business rules or configuration. The workaround would require business rules (scripts) to be disabled and staff would manually apply fees or staff voiding fees or refunding fees if duplication is occurring. ii. Notification going to citizens where the URL for the online portal, the Record ID, Decision, or attachments are missing. The workaround, Staff would take more calls around the notification received by the citizen. iii. Notification being sent to an incorrect contact on the record. The workaround, Staff would take more calls around the notification received by the citizen. iv. Incorrectly activating a workflow task status, for example where the task was not activated or based on business rules closing the workflow task. The workaround, Supervisor would need to override the workflow task status to activate the correct workflow task to proceed with the application life cycle. v. Workflow assignment is either not assigning to the correct department or is not assigning to a department (i.e. department would be blank). The workaround, Supervisors or Managers would need to use the Unassigned Reviews report for workflow assignment. vi. A Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). The workaround, Staff would take more calls around the notification not received by the citizen
Medium	This is a problem that is causing minor loss of feature functionality. Optional workarounds are acceptable, but causing significant efficiency loss. Problem is cosmetic, but public facing and deemed go-live critical. a. Examples: i. Notification going to citizens where Assigned Reviewer, Address, or Contact Types is missing. The workaround, Staff would take more calls around the notification received by the citizen. ii. Notification going to one of the contacts identified as recipient, but not all (for example going to the Applicant, but not the Owner). MUST be going to Applicant to be considered medium. The workaround, Staff would take more calls around the notification not received by the citizen. iii. Workflow assignment for the round-robin is incorrectly assigning staff users. The workaround, Staff assigned to the record would need to re-assign the workflow to the appropriate Staff iv. Incorrectly setting due dates in the workflow based on defined business rules. The workaround, Staff would need to manually set the due date. v. Required element such as document types, contacts, or custom fields are allowing the user to proceed w/out having met the requirement. The workaround, Staff would need to validate all required elements and if one was missing use the workflow task status of “Additional Information Required” to have the user provide the required information to proceed with the application process.
Low	This is a problem that is causing minor loss of feature functionality. Optional workarounds reasonably acceptable to the corresponding end-users are available with minor efficiency loss. Minor issues, misspellings, cosmetic changes, etc. a. Examples: i. Misspellings on instructions, data elements, report content, or notifications content. ii. Font inconsistencies, if data elements or online portal language is written in different fonts in different sections. iii. Inconsistency with Console configuration between departments, for example the record selection where there is the drop down rather than the decision tree or constraint within the defined filter is not displaying the entire defined criteria.

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PROJECT RESOURCES AND LOCATION OF WORK

WORK LOCATION

Services contracted under this SOW may be performed remotely and/or at Pinellas's on-site facilities as deemed appropriate and reasonable for the successful completion of the Services detailed herein.

PINELLAS RESOURCES

Pinellas must fill the appropriate roles with the appropriate personnel to work together with the Accela Engagement Team for these Services and that Pinellas will make available additional resources as needed for the Services to be successful. Pinellas roles can be filled by the same person. In addition, Pinellas will provide all necessary technical resources to make appropriate modifications within any Pinellas systems wishing to integrate with any Accela systems. These resources must be proficient in Pinellas coding/development environment and tools, to make the required changes to their software to enable integration and must be available during the timeframe of these Services. Pinellas roles include Sponsor, Project Manager, Technology Manager, and Business Lead(s) for each Division/department being implemented, Super User trainers, and others as appropriate.

Pinellas Resources	Description
Project Sponsor	Responsibilities include: • Ultimate responsibility for the success of the project, • Creating an environment that promotes project buy-in, • Driving the project through all levels of Pinellas, • 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	Responsibilities include: • Overall administration, coordination, communication, and decision-making associated with the implementation; • Planning, scheduling, coordinating and tracking the implementation with Accela and across departments within Pinellas; • Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track.
Division/Departmental Business Leads	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: • 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

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	• Review and test the system configuration; • Participating in the implementation of the Accela Civic Platform solution.
Division/Departmental Subject Matter Expert (SME)	Responsibilities include: • Being trained on the Accela Civic Platform system at a System Administration level; • 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 configuration; • Actively participate in the full implementation of the Accela Civic Platform solution.
Technical Lead	Responsibilities include: • 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 Accela 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.
Organizational Change Management Lead	Organizational Change Management (OCM) Lead will manage the people side of change – including changes to business processes, systems and technology, job roles and organization structures. A primary focus is to create and implement change management plans that maximize employee engagement. Responsibilities include the following: • Applies a structured change management approach and methodology for the people side of change caused by projects and change efforts. • Develops a change management strategy based on a situational awareness of the details of the change and the groups being impacted by the change. • Identifies potential people-side risks and anticipated points of resistance, and develops specific plans to mitigate or address the concerns. • Conducts readiness assessments, evaluates results, and presents findings in a logical and easy-to-understand manner.

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	• Develops a set of actionable and targeted change management plans – including communication plan specific to change, coaching plan, training plan, and resistance management plan. • Supports the execution of plans by employee-facing managers and business leaders. • Be an active and visible coach to coordination committee leaders, and stakeholder leads who are change sponsors. • Creates and manages measurement systems to track adoption, utilization, and proficiency of individual changes. • Identifies resistance and performance gaps, and works to develop and implement corrective actions. • Creates and enables reinforcement mechanisms and celebrations of success. • Works with project teams to integrate change management activities into the overall project plan. • Works with Project Management, Communication, Training Lead, Principal Enterprise Architect, Sponsors Team, and HR in the formulation of particular plans and activities to support project implementation. • Plans and conducts Coordination Committee, Project Teams, and Stakeholder Team Building. • Provides periodic updates to Project Teams and Stakeholders. • Plans and executes Coordination Committee, Project Teams, and Stakeholder Leads Project Kickoff.

ACCELA RESOURCES

Accela will assign key Professional Services resources for this engagement with Pinellas. These individuals are well versed in the Accela Civic Platform application, and are well qualified to lead this effort. Accela's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Pinellas resources assigned to the effort. The main roles are as follows:

Accela Resources	Description
Project Executive	The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Pinellas Executives monthly or upon request throughout the duration of the project.
Project Manager	The Accela Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including: • Project plan management, • Change order management,

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	• Issue log management and escalation, • Status reporting, • Project workspace management, • Resources management, • Work plan management, • Meetings management, • Project review with Project Executive. In addition, the Project Manager will actively participate in leading the System Configuration Analysis sessions and will be responsible for the creation of the System Configuration Document.
Solution Architect	The Solution Architect assigned to the project will have major experience in the business process as well as the product functionality and is responsible for: • Business analysis activities: Mapping the client's business processes and requirements to the functionality of Accela's products and the creation of solution design, • Leading system configuration activities, • Providing training/mentoring to Pinellas staff, • Recommend industry best practices to Pinellas to enhance business processes, • Guide Pinellas on how best to configure the system based on past experiences and software expertise.
Implementation Consultant	Implementation Consultant resources support the project and typically focus on the flowing tasks. • The configuration of the system to match the System Configuration document. • Build activities within the project, such as conversion data mapping, creation of reports and interface specification.
Technical Consultant	Accela Technical Consultants are involved in all areas that require knowledge o server-side considerations and Accela add-on products such as: • Application installation and setup (Accela Civic Platform, Accela GIS, Accela Wireless, and Accela Citizen Access), • Report definition and creation, • Event Manager Script definition and programming, • Database Conversions and data mapping assistance, • Interface specifications and development.
Training Consultant	Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.

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CONSULTANT RESOURCES

Accela may utilize Accela Partner resources in the roles and categories listed above. These Accela Partner resources are well versed in the Accela Civic Platform application and are well qualified to lead this effort. Accela's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Pinellas resources assigned to the effort. For this project, Accela has selected to partner with RedMark Technologies, LLC. RedMark is an Accela Certified Services Partner since 2006. They have worked closely with Accela to offer agencies the knowledge, resources and skills for the successful implementation of Accela solutions. RedMark specializes in providing analysis, configuration and implementation, among other services, and have assisted multiple agencies in the successful delivery of Accela Civic Platform. The table below shows some of the projects RedMark has delivered.

PINELLAS	YEAR
Lee County, FL	In process
Suffolk County, NY	2015
City of High Point, NC	2015
City of Concord, NC	2015
Tompkins County, NY	2014
City of St. Joseph, MO	2014
City of Tampa, FL	2014
County of San Diego, CA	2013
Reedy Creek, FL	2013
City of Indiannapolis, IN	2012
Jackson County, FL	2011
Escambia County, FL	2009
Miami Dade County, FL	2008
Brevard County, FL	2007

A sample of specific tasks RedMark has performed or delivered for the projects listed above are:

- Project Management
- Conduct analysis sessions and develop analysis documents
- Fully configure Accela Civic Plaform
- Document report specifications and develop reports
- Write, test and deploy scripts
- Analyze and perform data conversions
- Analyze and develop interfaces to:
  - Payment gateways
  - Document Management Systems
  - Finance systems
  - Asset Management systems
  - ERP systems
  - Other 3rd party systems
- Deploy and support all aspects of Accela add-ons:
  - Accela Citizen Access (ACA)
  - Accela Mobile Office (AMO)
  - Accela GIS (AGIS)
- Training on various Accela courses
- Conduct all aspects of User Acceptance Testing (UAT)

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- Support Go Live and Post Go-Live efforts

RedMark is a Florida based company headquartered in Boca Raton, FL. With 10 years of experience in the deployment and implementation of Accela Civic Platform solutions, RedMark has participated in over 50 contracts for Accela Civic Platform implementations and staff augmentation at over 40 individual State, County and City agencies

ACCEPTANCE

The Services contracted for in this Statement of Work will be considered Accepted when all Deliverables defined in the Work Description Section have been accepted by Pinellas as defined for each Deliverable. Additionally, transition to Accela's Customer Service Center, CRC has been completed. The live system has been handed over to the CRC and the transfer of knowledge from the Project Team to the CRC has also been completed. All training has concluded and project documentation has been handed over to the CRC.

Accepted By: Accela	Accepted By: Carahsoft Technology
By:	By:
Print Name:	Print Name:
Title:	Title:
Date:	Date:

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APPENDIX A – DELIVERABLES ACCEPTANCE FORM

Please acknowledge acceptance by:

A

Sign and fax this document to:

Accela, Inc.
YOUR NAME
YOUR TITLE
Tel:
Fax:

OR

B

Email this document as an attachment to:

YOUR EMAIL

Date:	
Pinellas Name:	
Approving Pinellas Manager:	
Accela Manager:	
Project Name / Code:	
Contract / Agreement #:	

Pinellas agrees that Accela has successfully completed the following Deliverables:

Deliverable #	**Source / Reference Details**	
	Service Agreement	

Pinellas agrees that Accela has successfully completed the Deliverables described above in accordance with the terms of the related Contract/Agreement.

APPROVALS:

Pinellas Name

Signature

Title

Date

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APPENDIX B – CHANGE ORDER TEMPLATE

Appendix B - Change Order Form Template

APPENDIX C – PCI COMPLIANCE

Appendix C - Accela PCI Compliance.pdf

APPENDIX D– DATA CONVERSION ASSUMPTIONS

The following information provides detail related to the scope of Accela's data conversion offerings. Due to the inherent complexity of conversion activities, it is critical to address and understand common questions and misconceptions. Any conversion activity or requirement not included in this section is considered out of scope, and may be addressed through a change order for Accela services.

GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS

- The standard data conversion includes the conversion of transactional data to the Accela Civic Platform database when a configured destination exists. In the event there is no destination for legacy transactional data then it will be required to be converted as best fits into another area of the configuration or excluded from the conversion effort, mutually agreed to by Pinellas and Accela..
- Accela will perform unit testing of the conversion program including spot checks of the data within Accela Civic Platform in order to identify if data corruption issues exist. Extensive quality assurance of legacy/historical data by the agency is required in order to ensure accurate transfer of data.
- A completed, signed off, Solution Foundation must be available before Accela will begin the data conversion mapping effort.

DATA CONVERSION ASSUMPTIONS

- **"As-Is" Approach:** Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed "As-is" into Accela Civic Platform. "As-is" means that the data will be transformed as mapped to existing configuration elements in Accela Civic Platform. The conversion process will not create configuration data or alter the mapped data when processed into Accela Civic Platform. Additionally this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela Civic Platform "As-Is". Invalid data may be rejected by the loading process and tools, in which case said data would not be loaded into or available to view on Accela Civic Platform. All data cleanup must occur prior to execution into Accela Civic Platform.
- **Accela Data Conversion Tools**: Data will be mapped and converted utilizing Accela's Extract, Translate and Load ("ETL") toolset. This will assist to ensure the accuracy of the mapping. The data mapping tool ensures that the legacy source to Accela Civic Platform solution is accurate and prevents data from failing to convert, while the execution tool can be used to consistently run conversion process and track statistics.

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- **Acceptable Data Formats For Historical Conversion**: It is expected that the Conversion Source Data be provided in an Oracle 10g/11g or Microsoft SQL Server 2000/2005/2008 database format. In the event that the source is not in an acceptable format, Accela will provide recommendations for transposing the data in the proper format.
- **Acceptable Data Formats For Reference Conversion:** It is expected that the Conversion Source Data be provided in Oracle 10g/11g, Microsoft SQL Server 2000/2005/2008, or pipe delimited flat file format. In the event that the source is not in an acceptable format, Accela will provide recommendations for transposing the data in the proper format.
- **Documents**: Historical/Legacy data conversion includes the conversion of attached documents into Accela Document Services ("ADS") in Accela Civic Platform, provided the Agency provides the documents in the structure Accela requires. The documents will be converted to the configured primary electronic document management system (EDMS). See Standard Document Migration for additional details. Documents Data Conversions are considered a separate and standalone conversion effort, and are therefore counted individually, even if the documents are part of another system that is being converted into Accela Civic Platform.

STANDARD DOCUMENT MIGRATION

The standard document conversion may be utilized to convert record/permit level attached electronic documents into the configured Accela Civic Platform EDMS systems. In the event a 3rd party EDMS is used by Accela Civic Platform, it is still possible to convert documents if the 3rd party interface supports the create method.

At a minimum the electronic document(s) to be converted must exist in a Microsoft Windows accessible file system (ex. NTFS, FAT32) and have the ability to identify the associated Record ID in order to be converted. In the event that the files exist in a database they must be extracted into a windows file system prior to be evaluated for conversion.

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APPENDIX E – PINELLAS REQUIREMENTS MATRIX

Appendix E - Pinellas County Requirements

APPENDIX F – GLOSSARY

This proposal and its contents use terminology commonly employed in the software industry. Accela has developed additional terminology under the Civic Platform that describes specific functions, features and other components that may not be readily known to the reader. For this reason, we have provided this Glossary to define terms that may appear elsewhere in our proposal.

Term	Definition
3-Tier Architecture	The system architecture representing a presentation layer, an application layer, and a data layer.
A	
Ability	Noun used to describe the flexibility of a "Solution" or "Peripheral" product of the system to be configured or customized to meet a specific purpose. Does not necessarily connote the inclusion of a function within a proposal.
Accela Application Server	A software framework that provides a means of executing back-end functions, scripts, and routines to support front-end applications. Accela's application server handles interactions between users and Civic Platform databases, executes code to perform distributed services, and supports complex database functions.
Accela Database Server	The server on which you install the back-end database infrastructure that supports the storage and retrieval of data in the Civic Platform.
Accela Document Services	An add-on component of the Civic Platform that provides a database for electronic documents. Accela Document Services is one of the document management systems that integrates with the Civic Platform, in addition to third-party document management integrations such as Microsoft SharePoint®, Filenet®, Documentum®, SIRE®, and Laserfiche®.
Accela Gateway	An application that serves as a proxy for requests for data from the Accela SaaS to the Civic Platform application server. Accela Gateway supports iOS, Android, and Windows apps.

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Term	Definition
Accela SaaS	One of two available architectural models for deploying the Civic Platform. With this option, Accela provides hosting services for the Civic Platform Server. See also *On-Premise*.
Active Directory	Microsoft's implementation of an LDAP system that houses resource information such as users, printers, servers, desktop computers, group policies, etc.
Ad-hoc Reports	A reporting tool in Civic Platform that provides access to the most commonly reported fields in the Accela database; does not require extensive knowledge of database structures, tables, or field names; provides an easy interface for creating reports and dashboards on the fly.
Ad Hoc Task	Task users can add to a standard workflow for a record.
Address, Parcel, Owner (APO)	*Addresses* are physical locations related to parcels. *Parcels* are pieces of land with specific locations and legally defined boundaries. Parcels can have multiple addresses. An *Owner* is associated with specific parcels and is typically the main person responsible for a parcel, as well as the point of contact.
Administrator Guide	Reference documentation that illustrates the core functions performed by an administrator responsible for maintaining the Civic Platform.
Alert	Reminder messages that are configured within the Civic Platform to remind users of upcoming, due, or past due dates. Alerts are viewed through the Alert screen in the Civic Platform. Alerts may also be configured to notify users via email.
Americans with Disabilities Act (ADA)	Also known as Section 508 of the Rehabilitation Act, the ADA is a federal act requiring agencies to give disabled employees and members of the public access to information that is comparable to the access available to others. The Civic Platform and Citizen Access are 508 compliant.
Analytics	A smartphone app that allows Pinellas staff to access Pinellas data on the iPad. Using the iPad's intuitive touch screen interface, Pinellas personnel gain real-time access to role-specific information in Pinellas's Civic Platform database. Analytics views property permits, license inspections, assets like storm drains and fire hydrants, and any other data that is tracked by Pinellas. This data is presented on Pinellas's Esri maps.
Application Intake Form	A form that enables users to create an application, a work order, or a service request in Civic Platform;

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Term	Definition
	consists of sections that correspond with record detail tabs.
Application Layer	In the 3-tier architecture model, this is the layer where the application program runs and executes all business logic.
Apps	Accela, developers and partners are working together to build and deliver apps and services that improve productivity for professionals, and to connect, simplify and engage citizens with their governments. These civic innovations are delivered through popular mobile devices and they available in the Accela Civic Store as well as the App Stores for those devices.
ArcGIS Server	Developed by Esri, a software platform that integrates with Accela's GIS capabilities. Enables agencies to share GIS resources such as maps, globes, address locators, and geo-databases, across their Pinellas and with citizens and public users.
Architecture	Term used to describe the structure or map of a software system. The Civic Platform's software components are found in three layers – presentation, application and data.
Asset	Any object that an Pinellas owns or maintains. Some examples of assets in this context include: buildings, desks, fire hydrants, manholes, parking lots, street signs, telephone lines, trucks, and valves.
Asset Management	A core solution in Accela's Civic Platform, it enables agencies to track and manage the lifecycle of assets, work orders, and resources. Asset Management automates costing, inventory, maintenance, investigations, and inspections; provides a means of managing the operation, maintenance, upgrade, and disposal of tangible and intangible assets.
Attachments	The various types of documents that users can add to records in Civic Platform or to email messages and calendar requests in Microsoft Outlook. Attachments can be any document type or EDMS.
Audit Trail	A log of all changes made to the system data. This log data includes date-and-time stamp, log-on user name, record status, and the action that was taken. The Civic Platform maintains audit logs for all changes to the Fees and Cashiering, Workflow, Activities/ Communications, Inspections/Investigations, and Conditions areas of the system.
Automation	Accela's flagship product and the heart of the Civic Platform, providing government departments and entire

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Term	Definition
	agencies with the tools to better manage workflow, track and enforce regulatory services, and communicate more effectively with office and field workers, the public, businesses, and other stakeholders.
B	
Barcode Scanning	A feature in the payment processing screen of Automation that enables users to read and retrieve system-generated invoices by scanning barcodes on invoices; a means of processing multiple records for payment via the Intermec SR30 handheld scanner.
Basemap	Within the Map Dashboard: The map background loaded within the dashboard with options that include imagery, topographic, street, and several others.
Batch Processing	An efficient way for users to execute common processes on multiple related records. For example, users can create a set of related records that share the same workflow, and then execute a batch process that updates the workflow task status for the entire set.
Bookmark Location	Within the Map Dashboard, a saved location within the map. This allows a user to immediately load areas of interest within the map.
Buffer	Within the Map Dashboard, an area defined by distance from a point or polygon centroid within the map. This is typically used within Planning to identify adjacent properties for notifications as well as to verify or alert the user to sensitive land uses.
Browser or Web Browser	A software application which enables a user to display and interact with text, images, videos, music and other information typically located on a Web page at a website on the Internet or a local area network.
Business Rules Engine	A feature that enables the automation of events and processes. The system uses Javascript to extend functionality associated with Automation events. The Civic Platform uses the Rhino open source JavaScript engine to convert configured rules into Java classes that the Civic Platform can execute. The Civic Platform supports a rules engine API for handling rules engine event parameters.
C	
Calendars	Civic Platform calendars integrate with Microsoft Outlook/Exchange and provide a means of scheduling

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Term	Definition
	and managing hearings, inspections, meetings, and events in the Civic Platform. The Outlook integration enables users to view the availability of attendees and manage attachments to meeting requests.
Case	The basic record in Accela's code enforcement solution. Each permit, license, complaint, internal service request, or evaluation that an Pinellas manages is identified with a unique case number.
Cashier Station	Civic Platform cashier stations provide Point of Sale functionality; Pinellas users (cashiers) calculate the amount due, provide options for public users to make payments, and then issue receipts. Civic Platform's cashier station functionality integrates with an electronic cash drawer and a slip printer, enabling cashiers to print receipts for POS transactions, process payments, endorse checks, and track the balance of funds in their cash drawers.
Change Management Plan	Document that defines the specific objectives and activities required to manage the organizational changes that accompany the implementation of enterprise software such as the Civic Platform.
Checklists	User-configurable checklist or outline of tasks associated to a given task or activity necessitating an item-by-item categorization to enable the completion of the activity in a more effective manner.
Citizen Access	A configurable Web-based application that integrates with the Civic Platform to provide citizens with online access to government services and information.
Citizen Relationship Management	A core solution in Accela's Civic Platform, it simplifies community engagement. Agencies can immediately respond to requests from residents and business owners through a configurable mobile app and web-based software, enabling two-way communication and real-time updates to requests. With Accela Citizen Relationship Management, you can: **Create a customizable website** and corresponding mobile app based on your community needs and showcase the services the city or county offers **Elevate your service** through a 24/7 citizen communication portal that can be accessed by citizens anytime and anywhere, on the device of their choice, making it easy to route requests and

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Term	Definition
	questions to the correct person, outside contractor or Pinellas **Enable community engagement** by allowing citizens to report and track issues with photos and geolocation, and then see them through to completion **Enable citizens to self-serve** through an extensive configurable knowledge base that is easily setup through a content management tool
CivicData.com	A free cloud-based open data platform that makes it easier for government agencies to publish and manage datasets. The service will give Accela customers and prospects the ability to provide rich government data to developers and citizens looking to transform data into civic solutions.
CivicID	A social media identity or user name for accessing Accela products, including Citizen Access, Civic Platform, and Accela mobile apps. You can connect your CivicID to your other social media accounts, like Facebook and Twitter, and log in to Accela solutions with your Facebook and Twitter credentials.
Civic Platform	Accela's Civic Platform provides complete solutions for automating critical tasks associated with Asset Management, Land Management, Licensing and Case Management, Environmental Health, and Right of Way Management. Civic Platform provides government departments and entire agencies with the tools to better manage workflow, track and enforce regulatory services, and communicate more effectively with office and field workers, the public, businesses, and other stakeholders. The Civic Platform is also an engagement platform used by government agencies large and small to streamline civic processes and engage with their communities. It includes the Civic Platform Developer Program, a program that enables Accela partners and developers to extend existing solutions, build custom solutions, and create innovative mobile apps.
Civic Platform GIS	Integrated solution that enable users to view maps and geospatial representations of land-use, zoning, and infrastructure information. GIS provides a robust solution for agencies to leverage geospatial data to improve decision-making and streamline processes.
Civic Platform IVR	A voice recognition system that integrates with Accela solutions to provide inspection, permit,

Term	Definition
	license, and other record management capabilities over the phone. IVR enables government agencies to extend their hours of operation and provide staff, contractors, and citizens with 24-hour access to records using touch-tone telephone keypad interaction or speech recognition.
Cloning	The act of creating a duplicate permit application, asset, or service request using an existing permit application, asset, or service request as a template. When users clone a record, they are creating a duplicate with a new record ID number. The source record is known as the parent, and the new cloned record is the child. When more than one record is cloned from a source parent, each cloned record is a sibling to the others.
Cloud Facility	A reference to the secure and redundant private location where Accela hosts the application, database and servers on behalf of its clients.
Code Officer	A smartphone app that allows Code Enforcement Officers to do their jobs more efficiently while working in the field with their smartphone or tablet. Integrated with the Civic Platform, Code Officer enables Officers to view locations of cases on a map containing Pinellas-defined map layers, perform sweeps and trace the paths on the map, create cases right from the app, view assigned cases, search for cases and inspections and add them to a list, and save searches for easy access.
Comma Separated Value (CSV)	This file format is a portable representation of a database that users can view and modify with Excel. Users can create a report from a list portlet by exporting all of the records in the portlet to a CSV file.
Communication Manager	A centralized communications hub that consolidates the Civic Platform's communications functionality into a single, centralized screen. Communication manager integrates with Microsoft Exchange and Outlook, enabling agencies to send meeting requests via the calendar screen, view the calendar availability of meeting attendees, and maintain Outlook emails and attachments in the Civic Platform database. Communication manager also integrates with SMS text messaging services, enabling you to communicate with Pinellas users by text message.
Computer-Based Training	Self-paced movies that demonstrate how to use Accela's software, and reinforce learning with practice sessions and review questions.

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Term	Definition
Condition	A certain requirement applied to a record (or component of a record) that the applicant must fulfill to qualify for approval. Although conditions do not necessarily impose holds, they can prolong the permitting process until they are met.
Configuration	User configurable activity in the setup and modification of the system to suit business rules and other requirements without the need for making changes to the source code or other foundational aspects.
Console	The entire working area within the Civic Platform, also known as the user interface. The console includes Pinellas bar; toolbars, controls, menu and toolbar buttons; main links; record tabs; portlets; and forms.
Contact	Any significant party (excluding licensed professionals) who participates in the record's process, such as the applicant, billing contacts, or legal contacts. Licensed professionals are treated as distinct types of people within Civic Platform.
Custom Fields	Fields an Pinellas can include on forms, such as application intake forms, in addition to standard fields. Administrators can customize the fields within each custom group, and determine whether users can search for an application based on those fields.
Customer Support	Customer Support provides live technical support between 4:00 a.m. and 6:00 p.m. Pacific Time, Monday through Friday, excluding Accela-observed holidays. Customer Support responds to all client issues and routes technical incidents accordingly based on the nature of the incident.
Customization	Modification made on rare instances to the source code of the Civic Platform without impairment to future upgrades.
D	
Dashboard	Task-centric and Map-centric views of records, inspections, and reference objects within the Civic Platform. These provide easy, at-a-glance summarized business information as charts, tables, odometers, etc. so users can graphically view actionable data like performance metrics and take steps to improve Pinellas operations.
Data Dictionary	A centralized repository of metadata that defines data's relationships to other data, its usage, and its format.

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Term	Definition
Data Layer	In the 3-tier architecture model, this is the layer where the physical database and data reside.
Data Manager	A tool for migrating Configuration Data across agencies and environments. Data Manager enables the migration of all record types, associated elements, and configuration settings in the back office Civic Platform and Citizen Access.
Dynamic Themes	In Accela Civic Platform GIS, the result of a query that a user runs against the Civic Platform database. As the data in the database changes, the query results can change. For example, if an Pinellas performs routine safety inspections on buildings in an area, a dynamic theme can show users on a map which buildings have been inspected and which have not.
E	
Electronic Document Review (e-PlanCheck or Adobe options)	A feature in the Civic Platform that enables agencies to digitally review, comment, and mark up building plans for electronic review. Accela EDR integrates with e-PlanCheck (a fully web-based solution built on the SQL database that users can easily deploy on a web browser) or Adobe Acrobat (enabling users to launch the program directly from the Civic Platform and access its annotation tools to digitally manage PDF versions of plans and documents).
Encryption	The process of obfuscating or masking data in such a way that if it were intercepted by another party it could not be understood. This keeps data safe as it travels the network.
Entity Relationship Diagram	A graphical representation of data entities and their relationships to each other that illustrates the organization of data in a database. An entity is a piece of data (an object or concept) about which data is stored. A relationship is how the data is shared between entities – the metadata – that defines the data's relationships to other data. There are three types of relationships between entities: one-to-one, one-to-many, and many-to-many.
Environmental Health	A core solution in Accela's Civic Platform, it enables agencies to better manage inspecting, permitting, and billing processes by providing the Environmental Health expertise, tools, and training agencies need to fulfill your mission and protect the public's health. The flexible, web-enabled offering includes the following key features:

Term	Definition
	Consolidated and Simplified Data Management Pinellas-Controlled Page Design and Configuration Activity Tracking and Workload Assessment Reporting and Querying Capabilities Task-Oriented Interface Compliance Tracking Permitting and Licensing Financial Management Complaint Management
Environmental Systems Research Institute (Esri)	An international supplier of Geographic Information System (GIS) software and geo-database management applications. Esri provides the standard in geographic and spatially referenced systems and applications. Accela partners with Esri to provide integrated GIS functionality.
Exchange Server	Microsoft's Enterprise class Email/Calendaring/Tasks system. Users tend to connect their local email programs (e.g., Microsoft Outlook) to an Exchange Server.
Expression Builder	A feature in the Civic Platform that provides an interface for writing expressions that perform calculations, provide drop-down lists, and auto-populate fields based on values that the user selects. An expression is a computer equation comprised of any combination of values, constants, variables, operators, and functions that help simplify data entry work, reduce data entry errors, and automate repetitive processes.
F	
Filter	A filter is a method of searching data based on one or more criteria, such that a larger set of data is filtered in a manner to meet some or all elements of that criterion. They may include limiting operators such as "and", "or", "less than", "greater than," etc.
Finance & Administration	A core solution in Accela's Civic Platform, it keeps your Pinellas's finance, utility billing, property tax and payroll tasks moving forward with powerful, easy-to-use tools to fuel fast, accurate work. Components include: **Finance and Budgeting** – Accurately manage the budget lifecycle with extensive features and plan for the future with capital budgeting and budget forecasting.

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Term	Definition
	Payroll and Human Resources – handle any deduction or benefit-of-pay scenario, including complex unions and FLSA overtime, for public safety. Track and manage human resources activities for the complete employee lifecycle. **Property Tax** - Exceed all residential, commercial and agricultural property tax needs from assessment through enforcement. **Utility Billing** - highly configurable billing for electric, gas, water and sewer. Full suite of meter-to-cash reports let you track revenue by service. Real-time online payments and e-bills make it easy to provide premium customer service.
Form Layout Editor	A feature in the Civic Platform that enables you to customize non-standard forms, such as APO (Address/Parcel/Owner) forms, custom fields, asset forms, and TSI (Task Specific Information) forms.
Form Portlet Designer	A feature in the Civic Platform that enables you to customize the standard forms. Forms are where Pinellas users enter data, and where the Civic Platform collects all of the data that it stores in the back-end database. You can design forms for use at Pinellas, solution, user group, and individual user levels, depending on your Pinellas's information gathering requirements.
Function ID	Four-digit identification numbers that enable and disable fields, security permissions, and functionality in the Civic Platform.
G	
Geocoding	In Civic Platform GIS/ArcGIS, the ability to assign a location, usually in the form of coordinate values (points), to an address by comparing the descriptive location elements in the address to those present in the reference material (map). Geocoding enables sophisticated displays of addresses and map information that agencies can use for a variety of purposes.
GIS Object	In Accela's GIS/ArcGIS, a digital representation of a spatial or non-spatial entity. GIS objects usually belong to a class of GIS objects with common attribute values and behaviors.
Go-Live	The date at which solutions of the system are put into production use at a given Pinellas / department.

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Term	Definition
GovXML	An Extensible Markup Language used as an application programming interface, that enables agencies to use various applications together with Accela's Civic Platform. GovXML is a standard for government solutions that provides a common interface for web-based government applications, and a means of information transfer between back-end systems and front-end, vendor-agnostic applications.
Graphical User Interface (GUI)	A user interface that allows users to interact with electronic devices through graphical icons and visual indicators.
Guide Sheets	A checklist, questionnaire, or outline of steps for an inspection. Guide sheets help inspectors complete their inspections more effectively.
H	
Hosted	An architectural model in which Accela hosts the Civic Platform server at its data center; one of two options for deploying the Civic Platform. This model is ideal for small- to midsized agencies in terms of price and functionality. *See also On-premise.*
I	
Implementation Schedule	Comprehensive document detailing all tasks, durations, resources, deliverables, dependencies required to implement Accela's Civic Platform. Same as "Project Plan" and "SOW".
Incident	A record in the Licensing & Case Management solution that indicates a one-time violation that can be easily corrected.
Inspection	A general observation of an asset or record. An inspection can include many specific observations.
Inspector	A smartphone app that connects mobile workers to their back-office accounts, enabling them to work from their desk, vehicle, or on site, using their preferred device. Users can perform a complete onsite process– from initial inspection to submittal– and also can view and update their inspection details including checklists, attachments and comments.
L	

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Term	Definition
Land Management	A core solution in Accela's Civic Platform, it enables agencies to coordinate all of the necessary activities for consideration and approval of site and building plans, processing permits, and conducting code inspections and enforcement activities. Facilitates the regulatory activities for the development and use of land resources. Includes separate solutions for permitting, planning and zoning, and code enforcement.
License	A professional document, plate, or tag issued as proof of legal permission to do or own something.
Licensed Professional	A person with a professional license, such as a contractor, architect, engineer, or developer who is responsible for completing the application's proposed work.
Licensing and Case Management	A core solution in Accela's Civic Platform, it enables agencies to track and manage regulatory processes associated with licensing, registration, inspection, investigations, complaint handling, hearings and legal action. Enables agencies to streamline customer service to licensed professionals and business entities and prioritize revenue-generating activities.
List	Lists display the existing records in the database, and include the Record, Inspections, and My Tasks. They also contain data organized into tables. Each column in the table has a dynamic heading that can sort data sorting in ascending or descending order.
Lookup	A button that enables users to look up existing records (contacts, addresses, and parcels, for example) and view the associated information.
M	
Map Service	A standard protocol developed by the Open Geospatial Consortium for delivering maps and geospatial images over the internet. These map images are generated from data stored in a GIS database and contain geocoding.
Metadata	Descriptive information that provides information about the data that resides in a database. In short, data about data. Metadata is stored in the database along with the data that it describes; the metadata element is associated with the data element to provide a frame of reference.
Mobile	A mobile government application that integrates with the Civic Platform to extend processing capabilities to

Term	Definition
	the field. This system is useful for activities such as inspections, investigations, disaster response, code enforcement, work orders, and service requests.
MS SQL Server	One of the two supported relational database management systems. See *Oracle Database*.
MySearch	A search pre-defined by an administrator that helps users to quickly access a list of items.
MyNavigation	A portlet in Civic Platform that provides flow diagrams users can refer to when performing their daily tasks. Flow diagrams help users follow Pinellas procedures by providing a visual aid for the task at hand, and simplify their user experience by providing links to the portlets they need to access to accomplish specific tasks.
O	
Object	A feature property that resides in a Feature Attribute Table (FAT) in GIS. An object may have many attributes. Every object exists on a layer with objects of the same type and class. Users can select one or more objects at a time. The number and types of objects are limited only by the number of layers an Pinellas creates and maintains.
On-Premise Deployment	One of two available architectural models for deploying the Civic Platform. With this option, Pinellas provides its own hosting services for the Civic Platform Server. This hosting option is ideally suited for the business needs of larger agencies. See also *Accela SaaS*.
Oracle Database	One of the two supported relational database management systems. See *MS SQL Server Database*.
P	
PgMO	Program Management Office
Page flow	A Java class that controls how a web application functions and what it does. Page flows control all of the major features of a web application: how users navigate from page to page, user requests, and access to the web application's back-end resources.
Parcel	A piece of land, such as a tract or a lot, with a specific location and legally defined boundaries.

Term	Definition
Password	A secret word or phrase used by an individual (typically, in conjunction with his/her username) to gain access to an application or other resource
Permissions	Controls that limit user access to certain tasks. The permission levels for each task are predefined and can be assigned to each user or user group.
Perpetual Licensing	Licensing model whereby an Pinellas “owns” the Civic Platform by the number of licensed users. An annual maintenance fee provides access to software upgrades (Pinellas installs) with telephone and web-based support.
Point of Sale	An integrated system for conducting financial transactions; the point at which a customer (citizen or public user) makes a payment to a merchant (Pinellas) in exchange for goods or services.
Presentation Layer	In the 3-tier architecture model, this layer provides an interface for the end-user into the Civic Platform system.
Preventive Maintenance Schedule	A scheduled task for specific assets that keep them in good working condition. Time and usage intervals determine the Preventive Maintenance schedule.
Project Charter	A key project document that defines project roles and responsibilities, outlines the project objectives, identifies the main stakeholders, formally empowers the project manager, and serves as a reference for the project.
Project Plan	Comprehensive document detailing all tasks, durations, resources, deliverables, dependencies required to implement Accela’s Civic Platform. Same as “Implementation Schedule” and “SOW”.
Public Users	Anyone who uses the public facing portion of Citizen Access, Accela IVR, or other Accela add-on solutions. Public users include Anonymous Users and Registered Users who either navigate Pinellas’s Citizen Access website or who use the Accela IVR phone and follow the call flow. System administrators can control which functions are available for both types of public users.
R	
Real-time connectivity	The ability of the system to send information to the database or retrieve information from the database on an instantaneous basis.
Record	A broad range of forms that users create and manage within the Civic Platform, including applications, cases, licenses, permits, service requests, and work orders.

Term	Definition
	Records provide a means of collecting the data that the Civic Platform stores in its back-end database, enabling users to access the data and process it to achieve their Pinellas's objectives.
Record Types	Record Types are a way that an Pinellas can organize applications in a group and define the complex processes required for completion, such as workflow, inspection schedules, and fees. They support the general business practices of Pinellas and the unique circumstances that are required for a specific type of application.
Reference Data	Administrator-defined information that users can copy into a Record. For example, an administrator creates a parcel record, with information on the location and size of the parcel. This information is reference data. When a user creates an application to build a house on the parcel, the information contained in the parcel record is re-usable within the application. The copy of the reference data is transaction data, and it is independent of the reference data.
Right of Way Management	Sold as a standalone solution or cross-sold with our Asset Management solution, this core solution in Accela's Civic Platform provides map-based coordination and uncovers potential conflicts, identifies new opportunities, improves planning and communication and saves you time and money when managing activities in the public right of way. With Right of Way Management, you can: **Plan and coordinate** road construction and street activities with all stakeholders **Identify conflicts and opportunities** between agencies in real time **Centralize project information** to share ongoing paving schedules and project plans **Display all street events and traffic impacts** in relation to construction and maintenance work **Alert and be alerted to any unplanned incidents** for construction, maintenance and special events **Upload, download, store and view documents** of important project- and permit-related information **Share a public view of all street activity** in a map-based format for citizens to access on the web
Report	An extraction and compilation of system data that can be created through third party reporting software

Term	Definition
	systems. The report can be printed, displayed on screen or saved to a file.
Report Manager	A reporting tool in the Civic Platform that interfaces with major reporting engines such as Crystal Reports, Microsoft Reporting, and Oracle Reports. Reports written using these tools are set up in Report Manager and run from Civic Platform screens.
Route Sheet	A feature in the Civic Platform that enables inspectors to map their route for maximum efficiency by minimizing the time and distance they travel to complete inspections. For example, inspectors can minimize travel distance using the Optimize by Distance option, and can minimize travel time using the Optimize by Time option.
S	
Service Request	Automates and managements interdepartmental or citizen service requests, complaints, or inquiries, providing an effective way to strengthen citizen relations.
Software Development Kit	Accela's SDK features a collection of APIs and tools for third party and government Pinellas developers, enabling them to build Accela-based apps. Each Accela SDK includes: APIs Getting Started Guide Platform Libraries Civic Platform Test Environments with recommended process configurations Sample Code Sample Apps
Standard Choice	Configurations an Accela administrator sets up for feature functionality, such as options available in dropdown lists, default field values, and other feature-specific functionality.
Standard Comments	Relevant, pre-written details users can select to populate in the Comments field of a record when completing applications, inspections, workflows, and guidesheets; streamlines the form completion process and improves data consistency.
Standard Solutions	Accela's out-of-the-box solutions for Asset Management, Land Management, Licensing and Case Management, and Environmental Health solutions. Standard Solutions provide specific record types,

Term	Definition
	workflows, custom fields, standard comments, and so forth, that represent standards for each solution.
Status	A phase or milestone in a permit or an inspection process. A status can indicate a phase of a process, such as “Pending,” or it can indicate another application state, such as “Accepted” or “Failed.”
Store-forward	The ability of Accela Mobility to retain captured information on the field device until the time that connectivity of the device with the system server is established at which time the captured information will be automatically transmitted without user intervention.
Subscription Licensing	Licensing model whereby an Pinellas “rents” the Civic Platform software and licenses users in the Accela Cloud, with the ability to scale up as internal demand increases.
Super Pinellas	The primary Pinellas in a multiple Pinellas implementation. A single deployment of Accela’s Civic Platform supports one super Pinellas and multiple agencies. The Civic Platform installer creates the super Pinellas and one user account with super administrator privileges. The super administrator creates additional agencies as required to satisfy business requirements. Super administrators can set up each Pinellas as completely independent entities, or enable agencies to share information. All agencies and the super Pinellas share a common database provided through the Civic Platform deployment.
System Administrator	The person in charge of one or more hardware and/or software systems.
T	
Task Card	A design view to aid users in browsing and provide relevant information and functionality that can help users plan their course of action to address their tasks.
Third Party	Reference to another product or company and not integral to products of Accela.
Tickler	An automated reminder that can be configured as an alert or email notification to remind one or more internal or external users of an upcoming, current, or past due date.
Time Accounting Tracker	A feature in the Civic Platform that enables Pinellas users to record the hours they spend working on specific projects. Administrators set up cost and billing

Term	Definition
	rates, and users enter the hours spent and materials used in the service of a particular activity, such as an inspection or asset maintenance. Once reported, this data is useful for multiple purposes, such as calculating the monthly working hours of employees, seeing who is overloaded and who is under-utilized, or calculating the total effort invested on certain project.
Trust Account	An account in which an Pinellas (acting as an authorized agent) holds funds for specific purposes, such as the payment of property taxes and/or insurance premiums associated with a property.
U	
User Acceptance Test	A series of functional, performance, and reliability tests conducted to determine if certain requirements have been met. It includes all system components, processes, workflows, customizations, interfaces, and reports. System Acceptance Testing is the final validation that the system functions in the way it is intended.
User Defined Field	A field in the system that can be user-configured and created for data capture. System mechanism which provides users the ability to create an unlimited number of fields (drop down, simple, radio, comment, etc) for capturing data.
User Manual	Reference documentation for end users that provides information on core uses of Accela's Civic Platform to support say-to-day business processes.
Username	An individual's unique identifier to an application or network.
V	
Valuation	The monetary equivalent for a certain item, building, or a certain type of work. The value for a certain project is the total job value, which the Civic Platform calculates using a single valuation or a group of valuations. The Civic Platform conducts the valuation of a piece of work by multiplying a quantity such as linear feet of pipe by a unit cost such as $25 per linear feet.
W	
Web Services	Web services allow organizations to communicate data without intimate knowledge of each other's IT systems

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Term	Definition
	behind the firewall. Web services also allow different applications from different sources to communicate with each other without time-consuming custom coding, and because all communication is in XML, Web services are not tied to any one operating system or programming language. In the case of Accela, Web services are being used extensively to exchange information from the backend database to the product capabilities and to third-party vendors.
Web-accessed	Something that is accessed over a public network such as the Internet
Web-based	An application that exists on a server typically accessed via an Internet browser
Will	Term used to describe the functionality of any component of Accela's Civic Platform to perform a specific purpose out of the box.
Work Crew	A smartphone app that allows Pinellas staff and authorized contractors to access and update Work Orders from their smartphone or tablet out in the field as work is being performed and completed. Integrated with the Civic Platform, Work Crew views locations of scheduled and completed work on a map containing Pinellas-defined map layers, checks off Work Order Tasks or Workflow as they are completed, adds supporting information such as task completion date/time, actual time spent on each task, actual material/parts/supplies used, attaches photos and audio messages, enters completed status with information and comments, and updates the Work Order status.
Workflow	A set of tasks an Pinellas defines and follows to process an application. These tasks are the essential steps in the application process, and are unique to each Pinellas. Workflows function as a checklist once an application is submitted.

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Change Order

Project Administration Document

Agency:_____
Project:_____
Date: _____

Version 1.0

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SAMPLE

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SAMPLE

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DOCUMENT CONTROL

Date	Author	Version	Change Reference

SAMPLE

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OVERVIEW

SUMMARY

PROPER USE

INTENDED AUDIENCE

ASSUMPTIONS

RECOMMENDED REFERENCE DOCUMENTS

PROS

CONS

SOFTWARE VERSIONS

SAMPLE

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CHANGE ORDER

Agency:		CO #:	
Project Code:		Date:	
Contract #/ PO #:		Date:	
Amendment #:		Date:	
Estimate / SOW #:			
Initiating Department:			
Initiated By:			

Change Category: ☐ Product ☐ Project ☐ Contract ☐ Maintenance

PROJECT CHANGE DESCRIPTION/TASK SUMMARY:

1. Description.
   - Issue details / scope impact:
   - Schedule impact:
   - Resource impact:
   - Cost impact:

Total Project Schedule Impact:
Total Project Resource Impact:
Total Project Cost Impact:

DISPOSITION COMMENTS:

Disposition: ☐ Approved ☐ Rejected ☐ Closed ☐ See Comments
Date:

SAMPLE

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SIGNATURE AND ACCEPTANCE

The above Services will be performed in accordance with this Change Order/Work Authorization and the provisions of the Contract for the purchase, modification, and maintenance of the Accela systems. The approval of this Change Order will act as a Work Authorization for Accela and/or Agency to perform work in accordance with this Change Order, including any new payment terms identified in this Change Order. This Change Order takes precedent and supercedes all other documents and discussions regarding this subject matter.

Accepted By:	Accepted By: Accela, Inc.
By:	By:
Print Name:	Print Name:
Title:	Title:
Date:	Date:

SAMPLE

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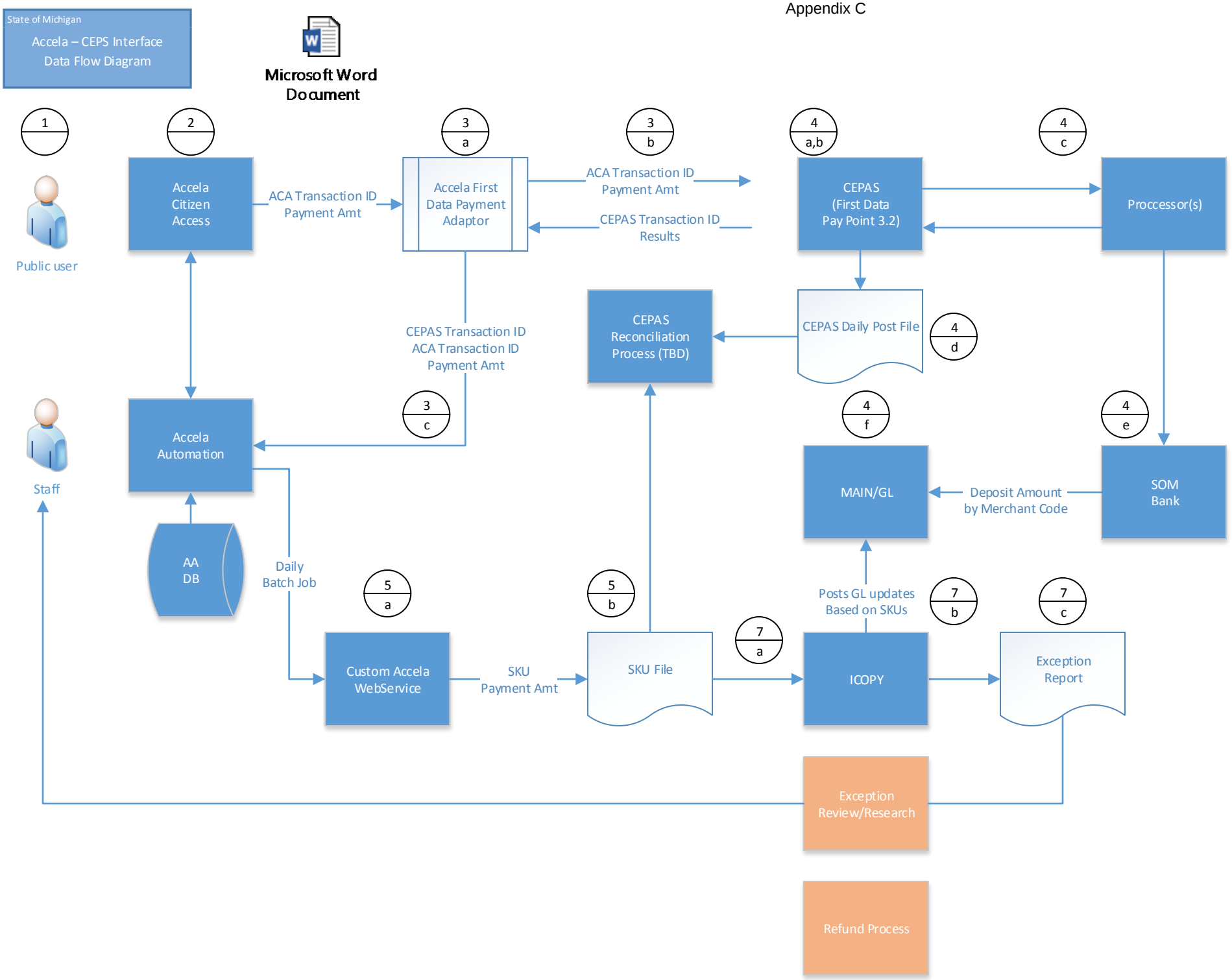
State of Michigan
Accela – CEPS Interface
Data Flow Diagram
Microsoft Word Document
1
2
3 a
3 b
4 a,b
4 c
Public user
Accela Citizen Access
ACA Transaction ID
Payment Amt
Accela First Data Payment Adaptor
ACA Transaction ID
Payment Amt
CEPAS Transaction ID
Results
CEPAS (First Data Pay Point 3.2)
Proccessor(s)
CEPAS Transaction ID
ACA Transaction ID
Payment Amt
CEPAS Reconciliation Process (TBD)
CEPAS Daily Post File
4 d
3 c
4 f
4 e
Staff
Accela Automation
MAIN/GL
Deposit Amount by Merchant Code
SOM Bank
AA DB
Daily Batch Job
5 a
5 b
Posts GL updates Based on SKUs
7 b
7 c
7 a
Custom Accela WebService
SKU Payment Amt
SKU File
ICOPY
Exception Report
Exception Review/Research
Refund Process

ATTACHMENT 3: BUSINESS FUNCTIONAL REQUIREMENTS

Appendix E

PROJECT OBJECTIVES:

Pinellas County is seeking to procure an enterprise application to serve as its core business system. This software system will be used to manage workflows and record keeping related to a variety of building and land use permits, trade licenses, code enforcement cases, periodic inspections, and regulatory enforcement programs. It will also be used to track and manage information for all Pinellas buildings and properties, such as land uses and building occupancies, unit counts, type of construction, rental unit status, and similar enduring characteristics that extend beyond a normal permit life-cycle.
The goal of the application is to provide a next-generation replacement to its current permit system that will provide core tracking and workflow functionalities, as well as electronic document management, electronic plan review, electronic payment, geographic information, and management reporting, to provide a seamless overall experience for internal and external customers.
The purpose of this requirements document is to solicit detailed information to ensure the application will meet multiple stakeholder's business needs. Pinellas County prefers to purchase an existing system that is commercially available without major customizations, in use by other similar agencies in other jurisdictions of a similar size and complexity, and proven to operate effectively over time.
Although Pinellas County is requesting requirements for complete systems, including software, and services that include any and all third-party components, the County at its sole discretion may choose not to acquire all optional system components. The County may also exercise the option to procure third-party components directly.
The system will provide a central portal through which all stakeholders (internal and external to the County) will access status information of past and present actions taken on a parcel. It will offer citizens and developers alike a unified approach to maneuvering what can seem to be a complicated process, and allow Pinellas County to "speak with one voice."

INSTRUCTIONS: Address all requirements outlined using the form provided and submit responses in Microsoft Excel format. Respond to each requirement with an "X" in the appropriate column under the "Functional Requirements Compliance Methodology" heading. The vendor is expected to warrant all positive responses (every response except those in the "Not Capable" column)**.**
Confirm that all responses which are marked in the "COTS", "COTS requires Configuration", or "Requires Customization" columns are included in the scope of proposed plan.
If any additional software module is required to meet relatively few of the requirements, and is thus not cost-efficient to include in the proposal, then the vendor shall mark the requirement in the columns "COTS", or "COTS with required configuration", and indicate accordingly in the "Explanation or Additional Comments" column that the additional software module(s) is available, and required to meet the specific Functional Requirement(s).

Definitions:
Commercial Off The Shelf (COTS) : The requirement is met by standard "out of the box" functionality built into the product.
Configuration: The requirement is not met with "out of the box" functionality however can be met through additional configuration using supported functionality built into the product. Configuration includes activities such as modification of drop-down menus, turning software functions on or off, modifying elements, parameters, fields, and workflows and the creation of specific reports using the standard functionality built into the product. These changes are a normal part of any implementation and do not require changes to the source code or schemas that may impact future upgrades and versions of the product.
Customization: The requirement is only met through customization of the product source code/schema or leveraging external third party code/scripts to meet the requirement. Customization requires alterations to be done at the programmatic level and requires a higher level of technical sophistication and may impact future upgrades or require the customization to be performed over again from version to version.

	System Functional Requirements		Functional Requirements Compliance Methodology				
	Category	**Requirement**	**Commercial Off-The-Shelf (COTS)**	**COTS, requires Configuration**	**Requires Customization**	**Not Capable as COTS, with Configuration, or Customization**	***(Optional)*** **Explanation or Additional Comments**
		1. Customer Relationship Management					
		a. Internet Self-Service					
	Internet Self-Service	Solution should provide a public-facing portal to mobile devices. Accommodating multiple operating systems (e.g., apple, android, windows).	**X**				The Accela Civic Platform offers a system web portal which is integrated and allows citizens, applicants and other members of the public the opportunity to accomplish many tasks including application submission, document submission, updates to information, downloads of documents, payments of fees, and much more. The system is built to accommodate the Windows operating system from any computer or mobile device having access to a standard web browser.
	Internet Self-Service	**Solution should provide a public-facing portal that allows authenticated customers to:**					
	Internet Self-Service	Submit complaints; with address verification/jurisdiction enabled		**X**			The submission of complaints, regarding any type of complaint can be configured in the solution and made available to the public for their completion/submission through Citizen Access, the system web portal. Address verification can also be configured to take place at the time the complaint is logged by the complainant.
	Internet Self-Service	Solution should provide the ability for the agency to assign applicable end dates (cut off dates) for the scheduling or canceling of inspection by the applicant.		**X**			Each task configured as part of the complaint workflow can have a start and end date (e.g. a duration) allowing the solution to fully abide by the elements of this requirement.
	Internet Self-Service	**Solution should provide a security scheme that allows:**					

ATTACHMENT 3: BUSINESS FUNCTIONAL REQUIREMENTS

INSTRUCTIONS: Address all requirements outlined using the form provided and submit responses in Microsoft Excel format. Respond to each requirement with an "X" in the appropriate column under the "Functional Requirements Compliance Methodology" heading. The vendor is expected to warrant all positive responses (every response except those in the "Not Capable" column)**.**
Confirm that all responses which are marked in the "COTS", "COTS requires Configuration", or "Requires Customization" columns are included in the scope of proposed plan.
If any additional software module is required to meet relatively few of the requirements, and is thus not cost-efficient to include in the proposal, then the vendor shall mark the requirement in the columns "COTS", or "COTS with required configuration", and indicate accordingly in the "Explanation or Additional Comments" column that the additional software module(s) is available, and required to meet the specific Functional Requirement(s).

Definitions:
Commercial Off The Shelf (COTS) : The requirement is met by standard "out of the box" functionality built into the product.
Configuration: The requirement is not met with "out of the box" functionality however can be met through additional configuration using supported functionality built into the product. Configuration includes activities such as modification of drop-down menus, turning software functions on or off, modifying elements, parameters, fields, and workflows and the creation of specific reports using the standard functionality built into the product. These changes are a normal part of any implementation and do not require changes to the source code or schemas that may impact future upgrades and versions of the product.
Customization: The requirement is only met through customization of the product source code/schema or leveraging external third party code/scripts to meet the requirement. Customization requires alterations to be done at the programmatic level and requires a higher level of technical sophistication and may impact future upgrades or require the customization to be performed over again from version to version.

System Functional Requirements			Functional Requirements Compliance Methodology				
	Category	**Requirement**	**Commercial Off-The-Shelf (COTS)**	**COTS, requires Configuration**	**Requires Customization**	**Not Capable as COTS, with Configuration, or Customization**	***(Optional)*** **Explanation or Additional Comments**
	Internet Self-Service	Ability to notify account holder before inactivating the account.		X			This notification can be achieved either manually by the authorized user or automatically triggered by other system actions (e.g. the assignment of a given status to a task).
	Internet Self-Service	**Solution should provide ability to process alternative methods of payment including:**					
	Internet Self-Service	Ability to authenticate e-signature and/or seal from customers, with the ability to differentiate between agencies.		X			The association between alternative methods of payments and the authentication of e-signature and/or seals is unclear for this requirement and will require more disucssion. The proposed solution can support the authentication of e-signatures and/or seals in a varietry of ways depending on established procedures and prevailing e-signature laws. At a minimum, we can accept electronic images of signatures that can be compared against signatures on file with the agency. We can also manage true electronic signatures should the agency have in place a public/private key infrastructure for electronic signature authentication.
	Internet Self-Service	Automatic payment from user established Trust Accounts.		X			Trust Accounts can be created and are supported by the solution, automatic payment for fees or other funds due can be automatically deducted by appropriate system configuration.
		b. Interactive Voice Response (IVR) Permit Access					
	Interactive Voice Response (IVR) Permit Access	**Solution should process alternative methods of payment including:**					
	Interactive Voice Response (IVR) Permit Access	Automatic payment from user established Trust Accounts.		X			Selectron is our recommended IVR solution and it can support the ability for callers to pay using a Trust Account.
		c. Electronic Plans Submittal and Review					
	Electronic Plans Submittal and Review	Ability to link to other data sets.		X			The proposed solution supports the import of standard comments and other standard review content for ready use within the application. Links to external data sets such as electronically available code sets and other guidelines and standards may also be configured for access during the electronic review process.
	Electronic Plans Submittal and Review	Ability to accept a variety of file formats and sizes.	X				While the proposed solution has the ability to acept documents in a variety of file formats and sizes, documents to be electronically reviewed must be in PDF format.
	Electronic Plans Submittal and Review	Solution should allow department staff to create plan review workgroups with unique workflows.		X			Configuration allows for an authorized user to establish plan review workgroups supporting unique workflows.

ATTACHMENT 3: BUSINESS FUNCTIONAL REQUIREMENTS

INSTRUCTIONS: Address all requirements outlined using the form provided and submit responses in Microsoft Excel format. Respond to each requirement with an "X" in the appropriate column under the "Functional Requirements Compliance Methodology" heading. The vendor is expected to warrant all positive responses (every response except those in the "Not Capable" column)**.**
Confirm that all responses which are marked in the "COTS", "COTS requires Configuration", or "Requires Customization" columns are included in the scope of proposed plan.
If any additional software module is required to meet relatively few of the requirements, and is thus not cost-efficient to include in the proposal, then the vendor shall mark the requirement in the columns "COTS", or "COTS with required configuration", and indicate accordingly in the "Explanation or Additional Comments" column that the additional software module(s) is available, and required to meet the specific Functional Requirement(s).

Definitions:
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Customization: The requirement is only met through customization of the product source code/schema or leveraging external third party code/scripts to meet the requirement. Customization requires alterations to be done at the programmatic level and requires a higher level of technical sophistication and may impact future upgrades or require the customization to be performed over again from version to version.

	System Functional Requirements		Functional Requirements Compliance Methodology				
	Category	**Requirement**	**Commercial Off-The-Shelf (COTS)**	**COTS, requires Configuration**	**Requires Customization**	**Not Capable as COTS, with Configuration, or Customization**	***(Optional)*** **Explanation or Additional Comments**
	Electronic Plans Submittal and Review	Solution should allow access/reviews for County Staff outside of the departments.	**X**				
	Electronic Plans Submittal and Review	Solution should allow access/reviews to agencies located outside of county government.	**X**				
	Electronic Plans Submittal and Review	Solution should alert applicants of review results via e-mail, phone or SMS.	**X**				All options are supported for alerting applicants.
	Electronic Plans Submittal and Review	Solution should return review comments and marked up plan set via e-mail at predetermined intervals during the review process and upon completion.		**X**			This functionality is supported and configuration will establish at what predetermined points or intervals such submissions are required.
	Electronic Plans Submittal and Review	Solution should have the ability to cut/copy and paste selected text from documents, codes, manuals, ordinances, policies, procedures, etc. from a user maintained SharePoint site or link to documents or resources that have URL addresses.	**X**				
		d. Internet based Complaint and Inquiry Tracking					
	Internet based Complaint and Inquiry Tracking	The required functionality is mandatory whether the proposer supplies this functionality through an interface to a third party product or through the use of functionality included in the product. The complaint and inquiry tracking software must be included as a part of the proposer cost proposal. Specify supported 3rd party products and/or what mechanisms are provided for integration.					All complaint tracking and management as well as inquiries by complainants and others are supported as part of the core functionality available in the solution.
	Internet based Complaint and Inquiry Tracking	Solution should allow complaints to be submitted over the Web.	**X**				Complaints can be submitted through pre-configured templates made available to complainants on the system web portal.
	Internet based Complaint and Inquiry Tracking	**Solution should provide ability to open a case (complaint) and record, store, and retrieve the following information:**					
	Internet based Complaint and Inquiry Tracking	Need ability to make fields required or not.		**X**			
	Internet based Complaint and Inquiry Tracking	Ability to create user-defined drop down menu selections or allow free form text.		**X**			
	Internet based Complaint and Inquiry Tracking	Ability to differentiate between agency.		**X**			Configuration can establish when inputs to the system need to be made by task owners. Task owners can be anyone to whom appropriate security permissions have been assigned by your system administrators.
	Internet based Complaint and Inquiry Tracking	Solution should provide ability to create a reminder or "tickler" in Microsoft Outlook so that the user is alerted to the next required action for a particular case.		**X**			
	Internet based Complaint and Inquiry Tracking	Solution should allow the uploading and storage to the record of scanned evidence documentation, photographs taken in the field, etc.		**X**			The system supports the attachment of any type of document or file that exists in an electronic format. The agency has the ability to determine the size and formats of such submittals through the web portal.

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	Internet based Complaint and Inquiry Tracking	Solution should be able to track time worked on a complaint/violation including staff entered field officer investigation time and notice postings as required by statute, office staff time to prepare citations, notices, hearings and County Legal time associated with all aspects of a complaint/violation.		X			
		2. UNIVERSAL FEATURES					
		a. Data-entry Support and On-Line Help					
	Data-entry Support and On-Line Help	Solution should provide a data dictionary of data layer owners for reference.		X			Both a Data Dictionary and an Entity Relationship Diagram are provided at the start of every system implementation after non-disclosure agreements are signed by both parties.
		c. Workflow					
	Workflow	Solution should provide ability to set time limits and notify when time limits have expired.		X			As noted in an earlier response, Accela Workflow can account for accommodating any task or activity as part of any application or complaint. Each task can have a duration according to the County's business rules.
	Workflow	**Solution should provide workflow components that include:**					
	Workflow	Sequential tasks or reviews		X			
	Workflow	Concurrent tasks or reviews with the ability to identify whether these concurrent tasks are cross-departmental.		X			
	Workflow	Pre-requisite dependencies with the ability to administratively override.		X			All such overrides subject to system audit trail provisions tracking who did what and when.
		d. Time Tracking					
		e. GIS					
	GIS	Solution should provide ability to reject submittals based on jurisdictions (e.g., unincorporated vs. municipal) and refer to appropriate authority.		X			The GIS/mapping component of the Accela system provides capability to configure proximity alerts that can query the location, and based on spatial data returned impact workflow via a message/warning or stop progress and not allow moving forward, essentially rejecting the submittal.
		f. Document Management					
	~~Document Management~~	~~Solution should provide ability to search pdf documents.~~				~~X~~	~~The proposed solution supports the association of documents of various types, including PDF, with records, parcels, contacts, and workflows within the system. These documents are easily located by keyword search or by accessing the entity to which the documents are associated. However, the content of these PDF documents is not searchable from within the solution.~~
	Document Management	Solution should provide ability to assign and identify parent/child relationships.	X				Parent/child relationships can be established, managed and reported upon in the solution.
		3.Plan Development					
	Plan Development	Based on system access privileges or assigned roles, solution should provide ability for users to override standard timeframes for each step in the plan development process.	X				All such overrides subject to system audit trail provisions tracking who did what and when.

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	Plan Development	At the users request to turn on/off, solution should provide prompts and notices prior to due dates for each step in the plan development process.		X			Communication Manager provides the ability to configure alerts at key points in the plan development process. It is up to the agency as to which alerts and how many alerts are generated during a given process. Currently end users (customers) are not given an option to receive or not receive such alerts, but internal users with proper system rights can make the determination as to whether specific alerts are to be sent to customers.
	Plan Development	Solution should provide ability to automatically re-set timeframes for subsequent steps in the planning process based on actual completion dates for previous steps.	X				
		a.Comprehensive Plan					
		4. Planning Cases					
		a. Project Review (Pre-application)					
	Project Review (Pre-application)	**Solution should provide ability to capture and access information about an application during pre-application discussions and research including the following:**					
	Project Review (Pre-application)	History of parcel, including splits and combinations, aka parcel genealogy-parent/child relationship.	X				
	Project Review (Pre-application)	Zoning Districts with a link to zoning ordinances.	X				
	Project Review (Pre-application)	Future land use in comprehensive Plan and use description and link to use description in FLUM categories.	X				This requirement is not clear and to accurately respond would require more information. Accela GIS supports accessing other third party URLs to view information in a pop-up browser window.
	Project Review (Pre-application)	Historic Landmark Designation, FMSF, and link to interactive database	X				Accela GIS supports accessing other third party URLs to view information in a pop-up browser window.
	Project Review (Pre-application)	Previous zoning applications and their status, including ordinance number, link to ordinance (Application WebXtender) and relevant stipulations	X				
		b. Application Submittal					
		c. Application Assignment					
		d. Application Review for Completeness					
		e. Case Analysis					
	Case Analysis	Solution should provide ability to conduct and track analysis for all case types.		X			Reports can be configured to extract system data. However, the reporting engines do not "analyze" data if that is the intent. If the intent is to, however, track the fact that an analysis has been undertaken, the system can be configured to account for all steps/processes in that analysis.
	Case Analysis	Solution should provide ability to record overall results of County's case analysis along each step of the process (e.g., approved, denied, track multiple cumulative actions, etc.), date decision was made and reasoning behind decision.	X				Assuming these comprise steps or tasks in a workflow, the solution will track all elements of this requirement.

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	Case Analysis	**Solution should provide ability to prepare documents using standard templates for each case type that are compatible with MS-Office applications (MS-Excel, MS-Word), including:**	**X**				
	Case Analysis	Applications with the ability to cross reference to application submittals.	**X**				
	Case Analysis	Ability for staff to edit and add templates.	**X**				
	Case Analysis	Solution should provide ability to allow insertion of pre-defined case analysis comments as well as ad hoc comments and auto-fill certain fields from initiation records		**X**			The proposed solution supports the configuration of pre-defined case analysis comments that can be selected and inserted into a case. Users may also elect to enter ad hoc comments in addition to the standard comments. Configuration of the business rules engine would be required to enforce auto-fill of certain comments based on the content of fields in the initiation record.
		f. Stipulations					
		g. Applicant Correspondence					
		h. Projects					
	Projects	Ability to link a project to "precursor" land use action.	**X**				
	Projects	Solution should provide ability to access all Planning information relevant to a particular project or parcel, including: zoning, topography, past and current entitlements, solar information, and historic resources designations. . See also previous requirement above.	**X**				
		i. Public Notice					
	Public Notice	Solution should provide ability to adjust the generation of notices and boundaries.		**X**			If the intent of the terminology of "adjust" is related to both content and timing, the system supports this requirement by its appropriate configuration by authorized users.
	Public Notice	Solution should provide ability to maintain a contact list and log of contacts,and generate mailing labels.	**X**				
	Public Notice	Ability to generate notices for posting.		**X**			Notices are in effect reports generated by employing the supported reporting engines.
		j. Hearing Process					
	Hearing Process	Solution should provide ability for electronic routing and circulation of agenda and agenda packet for review.	**X**				
		k. Decision Writing					
		l. Land Use Conditions					
	Land Use Conditions	Solution should provide ability to display LU conditions associated with a project when querying parcel, case number, address, etc.	**X**				
		5. PARCEL AND ADDRESS INFORMATION					
		a. General					
		b. Address					

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	Address	Solution should provide a data dictionary of data layer owners for reference. See also requirement in Data Entry Support and Online Help.	**X**				Both a Data Dictionary and an Entity Relationship Diagram are provided at the start of every system implementation after non-disclosure agreements are signed by both parties.
		c. Parcel					
		d. Building					
		6. Permits and Case Tracking					
		a. Trade Licensing					
	Trade Licensing	Solution should be able to interface with Pinellas County Construction Licensing Board database and update all license parameters on a predetermined update schedule. Solution should have the ability to block all activity for a license when and expiration date is reached without renewal.		**X**			Configuration would be needed to develop an interface to the named third party system. Configuration can also be conducted to achieve the blocking of all workflow activity when a given license has expired.
		b. General					
		c. Pre-Development					
	Pre-Development	**Solution should provide ability to record changes to project description during application review process, including maintaining historical records on initial submittal.**	**X**				All such changes would be subject to audit trail provisions for accountability and transparency of County operations.
	Pre-Development	**Pre-development Information (e.g., after Planning review):**		**X**			Pre-Development information can be captured by configuration of appropriate case type templates onto which such information could be input, managed and reported upon.
	Pre-Development	Ordinance, resolution, case, site plan, permit numbers, etc.		**X**			
		d. Post Occupancy Information					
		e. Plan Check, Permit Application and Issuance/Approvals					
	Plan Check, Permit Application and Issuance/Approvals	**Solution should provide ability to capture related items of information including:**	**X**				
	Plan Check, Permit Application and Issuance/Approvals	**Permit Application Information:**	**X**				
	Plan Check, Permit Application and Issuance/Approvals	Solution must provide the ability to align with reviewing bodies and approvals (existing and planned).		**X**			Accela Workflow can accommodate the inclusion of any internal or external agencies for application or complaint reviews where needed.

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	Plan Check, Permit Application and Issuance/Approvals	Solution should provide ability to count down and track number of units, parking, density, ISR.		X			Business rules supporting the management and tracking of number of units, parking, density, and ISR would need to be configured in the business rules engine to support specific count down and tracking functions as required.
	Plan Check, Permit Application and Issuance/Approvals	Ability to capture user defined application information that is requested.	X				
	Plan Check, Permit Application and Issuance/Approvals	FEMA Compliant Structure.		X			
	Plan Check, Permit Application and Issuance/Approvals	FEMA 50% Rule Compliance/Calculations.		X			
	Plan Check, Permit Application and Issuance/Approvals	FEMA Certifications (Building Department Approval)		X			
	Plan Check, Permit Application and Issuance/Approvals	Grease Trap/Interceptor		X			The proposed solution provides the ability to configure fields to capture the type and size of grease trap or grease interceptor for review during the permitting process. Once approved, this information is available for inspections as well as any enforcement activities around sewer spills or other grease-related backups.
	Plan Check, Permit Application and Issuance/Approvals	Solution should provide ability to capture (or recreate) all data associated with a permit as a snapshot when the permit is issued.	X				
		f. Certificate of Occupancy (CO) and Certificate of Completion (CC)					
	Certificate of Occupancy (CO) and Certificate of Completion (CC)	Solution should be able to notify via USPS, e-mail or SMS other county departments/staff and other outside agencies based on parameters selected during permit application or automatically during permit issuance for specific on-line permits.		X			
		7. Inspections					
		a. General					
	General	Solution should provide ability to specify which inspections require any fee.		X			

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	General	Solution should have the ability to automatically schedule associated inspections for other departments or outside agencies. (e.g., Fire Final on Building final, Fire sprinkler tests)		X			
	General	Solution should have the ability to allow each inspector to manually modify their inspection routing on a real time basis from their field device. When the inspector's initial route is accepted by the inspector it will display in two hour ETA windows that automatically adjust throughout the day based on inspector location and completed inspections. Each inspector's route, name and photograph should be accessible via an ACA query by inspector name, permit number or address.	X				This requirement is partially satisfied. Accela Mobile solutions support inspectors adjusting the estimated time of arrival window which will update the back office and can reflect the change in the Citizen Access portal, as well as can be leveraged by writing an integration to IVR system if required. The inspectors can update this field on each inspection throughout the day. The Inspection Contact name and number is also available on each inspection for the inspector to be able to call or text directly from their iPhone or Android phone, or view on tablet and call via mobile phone. The inspectors route, name and photograph is not accessible from a web portal query.
	General	Solution should provide each inspector suggested travel routing between inspections via GPS location guidance.					
		8. Code Compliance					
		a. Notice of Violation and Correction Notice					
	Notice of Violation and Correction Notice	Solution should provide ability to track violations based upon violation type, status, location, parcel id's, and STR's.	X				
	Notice of Violation and Correction Notice	Solution should provide the ability to post data for case activity or the notice as a draft prior to being posted on the internet or available as the public record with full control of data available for viewing.		X			The proposed solution can be configured to allow a review of inspection results and approval prior to having the results post to the internet. An automatic delay can also be configured if desired to allow facilties in violation to correct deficiencies prior to posting to the internet.
	Notice of Violation and Correction Notice	Solution should provide ability to support submittal of complaint from a mobile device (e.g. take a photo of a violation and submit with geo-location info from hand held device). Pinellas County uses the "See Click Fix" application).		X			Accela will support this requirement by the development of an interface to the See Click Fix application.
	Notice of Violation and Correction Notice	Solution should provide ability to produce, print, and email all enforcement correspondence.	X				
		b. Code Enforcement					
	Code Enforcement	Solution should provide ability to create user defined criteria for mapping or statistical data reporting.	X				
	Code Enforcement	Solution should provide ability to change violation status along with compliance and case closure dates separately.	X				Changing of such data subject to system audit trail provisions capturing who did what and when.
	Code Enforcement	Solution should provide ability to capture and bill for additional fees, penalties (penalties may be per day, and/or flat amount plus interest) and code enforcement costs incurred (including time and materials plus interest).	X				

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	Code Enforcement	Solution should provide ability to track and control all requests from complaint to violation and thru corrections and full compliance.	X				
	Code Enforcement	Solution should be able to accept or deny complaints based on jurisdiction. When denied, the solution should provide the complainant the appropriate jurisdiction via return e-mail.		X			
		9. Fee Calculation and Tracking					
		a. General					
	General	Solution should provide ability to restrict based on roles and access rights.	X				
	General	Solution should provide ability to calculate, assess, and track all penalty fees including interest associated with code enforcement.	X				
	General	**Solution should provide ability to support the following fee type calculations:**	X				
	General	Variable fee based on units (or deposits).		X			Supported through system configuration.
		10. System Administration					
		11. REPORTING AND BUSINESS INTELLIGENCE					
		12. TECHNICAL					
		a. General					
	~~General~~	~~Should provide ability to auto-populate into GIS to track zoning, land, etc. use information~~				~~X~~	~~Accela system can read spatial information and perform spatial queries, but does not auto-populate any data in the feature classes in GIS.~~
		b. Audit					
		c. Configuration and Support Components					
	Configuration and Support Components	**Solution should include configuration and support software that includes:**					
	Configuration and Support Components	Track changes to cases and numbering	X				Using Audit Logging the system can track record information (e.g. changes to field, who made the change and date/time).
		d. Integration / Interface					
	Integration / Interface	~~Solution should provide ability to interface with existing County systems that are using a variety of database systems such as Oracle DB Standard, SQL Server and MS Access. Potential interfaces include: SAP, Linko CTS, Linko FOG Tracker,~~ Tax Collector, ESRI GIS, ~~Granicus Agenda Automation.~~		X			Virtually every implementation of the Accela Civic Platform involves the development of one or more interfaces to existing third party systems. Accela has developed more than 50 such interfaces to varying types of systems.
		e. Network/Communications					
		f. Mobile Support					
	Mobile Support	Solution should provide ability to access and complete service request activity information from wireless devices and must support multiple operating systems. (i.e. Apple, Android, Windows, etc.)	X				Public users can submit service request through Accela Citizen Access portal on their laptop or tablets 24/7. Aside of ACA, we also provide a partner developed app-311 for citizens to log service requests via smart phones on either iOS or Android system. Apple iOS is not supported. For more information about 311 app please visit: http://www.accela.com/civic-apps/311

ATTACHMENT 3: BUSINESS FUNCTIONAL REQUIREMENTS

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Confirm that all responses which are marked in the "COTS", "COTS requires Configuration", or "Requires Customization" columns are included in the scope of proposed plan.
If any additional software module is required to meet relatively few of the requirements, and is thus not cost-efficient to include in the proposal, then the vendor shall mark the requirement in the columns "COTS", or "COTS with required configuration", and indicate accordingly in the "Explanation or Additional Comments" column that the additional software module(s) is available, and required to meet the specific Functional Requirement(s).

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Customization: The requirement is only met through customization of the product source code/schema or leveraging external third party code/scripts to meet the requirement. Customization requires alterations to be done at the programmatic level and requires a higher level of technical sophistication and may impact future upgrades or require the customization to be performed over again from version to version.

	System Functional Requirements		Functional Requirements Compliance Methodology				
	Category	**Requirement**	**Commercial Off-The-Shelf (COTS)**	**COTS, requires Configuration**	**Requires Customization**	**Not Capable as COTS, with Configuration, or Customization**	***(Optional)*** **Explanation or Additional Comments**
		g. Redundancy and Business Continuity/Disaster Recovery					
	Redundancy and Business Continuity/Disaster Recovery	Solution should provide a disaster recovery solution including a complete offsite server and networking installation that has the capability to roll from the primary site to this offsite location within a 24-hour recovery window. This roll over shall include all applications and data. (e.g., FEMA reporting and tracking requirements)	X				All elements of this requirement are supported by installations supported and maintained on the Accela Cloud.
		h. Security					
		i. Scalability					
		j. System Operations Support and Handling					
		k. Universal Queue Support					
		l. Virtualization Architecture					
	Virtualization Architecture	Has your proposed virtualized solution been implemented in at least one other jurisdiction?	X				Yes, in fact at countless public agencies.
		13. General GAPS in current business process					
	General GAPS in current business process	Ability to track who initiates an application - Intelligent numbering by case.	X				Both aspects of this requirement are supported by the solution.
	General GAPS in current business process	Contract inspectors should have access to inspection module.	X				This is a matter of providing these contract inspectors with the appropriate roles and privileges in the system and in particular with the Mobile component of the Accela Civic Platform to enable them to conduct their field inspection duties.
	General GAPS in current business process	Should have ability to log schedule or dispatch building complaints into the inspection module via scheduling/routing processes	X				The solution acts as one single and integrated system.
	General GAPS in current business process	Should have ability to search by IVR number.		X			While an IVR number can be configured for use, IVR is typically promoted for inspection scheduling, management and result. Accordingly, an IVR number would not be needed since searches could be conducted on virtually any field including Record ID, Address, Parcel, etc.
	General GAPS in current business process	Ability to track and close inspections separately, on large multi-story buildings with several inspections. Contractor should be able to schedule remaining inspections on other stories.	X				
	General GAPS in current business process	Ability to track or identify customers interacting with Air Quality Department.	X				Providing that these customers and their interactions with the Air Quality Department are being identified in some way in the system.

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	General GAPS in current business process	Ability to notate FEMA certificate approval via drop down or check box.	X				
	General GAPS in current business process	Ability to easily pull up permit history by parcel.	X				
	General GAPS in current business process	Standardization of data entry fields i.e. name, address etc.	X				
	General GAPS in current business process	Ability to look up all case numbers under one complaint.	X				
	General GAPS in current business process	Ability to view all violation alerts from multiple departments.	X				This is achieved either as a query or as a custom report but more easily achieved by viewing the information within the application.
	General GAPS in current business process	When identifying type of permit provide additional descriptors such as roof, electrical etc.	X				
	General GAPS in current business process	Ability to retain a record of closed bonds and bond inspection reminders.		X			This information can be configured for capture, tracking and reporting purposes.
	General GAPS in current business process	Ability to capture free form comments that are submitted electronically and attach to case file.	X				
	General GAPS in current business process	Ability to track and document applications and actions on countywide map (includes municipal areas).	X				The mapping compnoent of the Accela system supports showing the locations of transaction records and inspections on the map.
	~~General GAPS in current business process~~	~~Ability to interface with existing Pinellas County Emergency Management Systems and protocols.~~		~~X~~			~~Virtually every implementation of the Accela Civic Platform involves the development of one or more interfaces to existing third party systems. Accela has developed more than 50 such interfaces to varying types of systems.~~
	General GAPS in current business process	Solution should have the ability to receive requests for, and to schedule, Zoning Board meetings, Development Review and Building Pre-Application meetings within staff defined parameters.	X				

ATTACHMENT 3: BUSINESS FUNCTIONAL REQUIREMENTS

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System Functional Requirements			Functional Requirements Compliance Methodology				
	Category	**Requirement**	**Commercial Off-The-Shelf (COTS)**	**COTS, requires Configuration**	**Requires Customization**	**Not Capable as COTS, with Configuration, or Customization**	***(Optional)*** **Explanation or Additional Comments**
	General GAPS in current business process	Solution should have the ability ~~to interface with Microsoft Outlook staff calendars and~~ alert outside stakeholders via e-mail or SMS.	**X**				