Nevada Taxicab Authority

Technical Proposal

Taxicab Authority Records Management Modernization Project
ID 3422
Opening Date: June 15, 2017
Opening Time: 2:00 PM

Telecommunications Development Corp.
1919 13th Street, NW
Washington, DC 20009

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Executive Summary

Telecommunications Development Corporation (TDC) is pleased to present its proposal in response to the State of Nevada RFP 3422 for the Taxicab Authority Records Management Modernization Project (RMS). TDC, in partnership with Practice Vantage, herein proposes to implement a Salesforce configuration to meet all of the requirements set forth by the State and the Authority.

TDC and Practice Vantage have recently completed two (2) phases of implementation of Salesforce in support of the District of Columbia Department of For Hire Vehicles (DFHV), formerly the DC Taxicab Authority. The DFHV awarded TDC the configuration and implementation of Salesforce to support all driver and vehicle licensing and registration functions, to implement a portal for companies and drivers, and to configure and implement case management functionality to support management and tracking of complaints and agency inquiries. TDC and Practice Vantage are currently engaged with the DFHV in support of agency and stakeholder adoption activities, and for maintenance, support, and change activities.

TDC and Practice Vantage have worked with the DFHV since October 2015, and have collectively gained a wealth of experience related to the "Vehicle For Hire" industry. The TDC team of key personnel bring over 20 years of collective Salesforce experience, over 10 years of transportation data management experience, over 15 years of experience managing the implementation of enterprise wide data management and case management solutions, and are the very team responsible for the successful implementation of Salesforce at the DFHV. TDC proposes on site management and administration of the project to facilitate real time and active engagement with the TA stakeholder community, and to facilitate flexibility for project stakeholders to support on-going operations of the TA.

The TDC proposed solution is comprised primarily of Salesforce configured capabilities accompanied by a few proven Salesforce App Exchange tools to provide for seamless functionality for payment processing and e-signature.

The TDC team is excited at the opportunity to support the Records Management Modernization of the Taxicab Authority, and looks forward to the possibility of a value added and mutually beneficial relationship.

III. Vendor Information Sheet

The following is the Vendor Information Sheet for RFP 3422.

VENDOR INFORMATION SHEET FOR RFP 3422

Vendor Must:

A) Provide all requested information in the space provided next to each numbered question. The information provided in Sections V1 through V6 will be used for development of the contract;

B) Type or print responses; and

C) Include this Vendor Information Sheet in Tab III of the Technical Proposal.

V1	Company Name	Telecommunications Development Corp.

V2	Street Address	1919 13th Street, NW

V3	City, State, ZIP	Washington, DC 20009

V4	Telephone Number		
	Area Code: 202	Number: 234-9400	Extension:

V5	Facsimile Number		
	Area Code: 202	Number: 234-0772	Extension:

V6	Toll Free Number		
	Area Code:	Number:	Extension:

V7	***Contact Person for Questions / Contract Negotiations, including address if different than above***
	Name: Roger Richmond
	Title: Vice President/Principal
	Address: 1919 13th Street, NW, Washington, DC 20009
	Email Address: rrichmond@telcomdc.com

V8	Telephone Number for Contact Person		
	Area Code: 202	Number: 234-9400	Extension:

V9	Facsimile Number for Contact Person		
	Area Code: 202	Number: 234-0772	Extension:

V10	***Name of Individual Authorized to Bind the Organization***	
	Name: James Woodyard	Title: President/CEO

V11	Signature ***(Individual must be legally authorized to bind the vendor per NRS 333.337)***	
	Signature:	Date: 6/15/2017

IV. State Documents

A. Signed Amendments

The following are the signed signature pages for 3422 Amendment 1 and 2.

Reporting & Reconciliation Implementation Guides

Reporting Developer Guide
View | Download
Merchant Account Reports Developer Guide
View | Download
Merchant Account Reports User Guide
View | Download

Gateway Developers Guides For Card and eCheck services

Credit Card Services Using the Simple Order API: View | Download
Card-Present Processing Using the Simple Order API (Supplement to *Credit Card Services Using the Simple Order API*): View | Download
Electronic Check Services for the Simple Order API: View | Download

ALL ELSE REMAINS THE SAME FOR RFP 3422.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: Telecommunications Development Corp.

Authorized Signature: Richard Mann

Title: Richard Mann, Proposal Manager Date: 6/7/2017

This document must be submitted in the "State Documents" section/tab of vendors' technical proposal.

Vendor Name: Telecommunications Development Corp.

Authorized Signature: Richard Mann

Title: Richard Mann, Proposal Manager Date: 6/7/2017

This document must be submitted in the "State Documents" section/tab of vendors' technical proposal.

B. Confidentiality and Certification of Indemnification

The following is a signed copy of Attachment A, Confidentiality and Certification of Indemnification.

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION

Submitted proposals, which are marked "confidential" in their entirety, or those in which a significant portion of the submitted proposal is marked "confidential" **will not** be accepted by the State of Nevada. Pursuant to NRS 333.333, only specific parts of the proposal may be labeled a "trade secret" as defined in NRS 600A.030(5). All proposals are confidential until the contract is awarded; at which time, both successful and unsuccessful vendors' technical and cost proposals become public information.

In accordance with the Submittal Instructions of this RFP, vendors are requested to submit confidential information in separate binders marked "**Part IB Confidential Technical**" and "**Part III Confidential Financial**".

The State will not be responsible for any information contained within the proposal. Should vendors not comply with the labeling and packing requirements, proposals will be released as submitted. In the event a governing board acts as the final authority, there may be public discussion regarding the submitted proposals that will be in an open meeting format, the proposals will remain confidential.

By signing below, I understand it is my responsibility as the vendor to act in protection of the labeled information and agree to defend and indemnify the State of Nevada for honoring such designation. I duly realize failure to so act will constitute a complete waiver and all submitted information will become public information; additionally, failure to label any information that is released by the State shall constitute a complete waiver of any and all claims for damages caused by the release of the information.

This proposal contains Confidential Information, Trade Secrets and/or Proprietary information as defined in ***Section 2 "ACRONYMS/DEFINITIONS."***

Please initial the appropriate response in the boxes below and provide the justification for confidential status.

Part IB – Confidential Technical Information			
YES		NO	X
Justification for Confidential Status			

A Public Records CD/Flash Drive has been included for the Technical and Cost Proposal			
YES	X	NO (See note below)	
Note: By marking "NO" for Public Record CD/Flash Drive included, you are authorizing the State to use the "Master CD/Flash Drive" for Public Records requests.			

Part III – Confidential Financial Information			
YES	X	NO	
Justification for Confidential Status			
Legal counsel recommends financial information be kept confidential.			

Telecommunications Development Corp.
Company Name

Signature

James Woodyard
Print Name

6/15/2017
Date

This document must be submitted in Tab IV of vendor's technical proposal

C. Vendor Certifications

The following is a signed copy of Attachment C, Vendor Certifications.

ATTACHMENT C – VENDOR CERTIFICATIONS

Vendor agrees and will comply with the following:

(1) Any and all prices that may be charged under the terms of the contract do not and will not violate any existing federal, State or municipal laws or regulations concerning discrimination and/or price fixing. The vendor agrees to indemnify, exonerate and hold the State harmless from liability for any such violation now and throughout the term of the contract.

(2) All proposed capabilities can be demonstrated by the vendor.

(3) The price(s) and amount of this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other contractor, vendor or potential vendor.

(4) All proposal terms, including prices, will remain in effect for a minimum of 180 days after the proposal due date. In the case of the awarded vendor, all proposal terms, including prices, will remain in effect throughout the contract negotiation process.

(5) No attempt has been made at any time to induce any firm or person to refrain from proposing or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal. All proposals must be made in good faith and without collusion.

(6) All conditions and provisions of this RFP are deemed to be accepted by the vendor and incorporated by reference in the proposal, except such conditions and provisions that the vendor expressly excludes in the proposal. Any exclusion must be in writing and included in the proposal at the time of submission.

(7) Each vendor must disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict should be disclosed. By submitting a proposal in response to this RFP, vendors affirm that they have not given, nor intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement. Any attempt to intentionally or unintentionally conceal or obfuscate a conflict of interest will automatically result in the disqualification of a vendor's proposal. An award will not be made where a conflict of interest exists. The State will determine whether a conflict of interest exists and whether it may reflect negatively on the State's selection of a vendor. The State reserves the right to disqualify any vendor on the grounds of actual or apparent conflict of interest.

(8) All employees assigned to the project are authorized to work in this country.

(9) The company has a written equal opportunity policy that does not discriminate in employment practices with regard to race, color, national origin, physical condition, creed, religion, age, sex, marital status, sexual orientation, developmental disability or handicap.

(10) The company has a written policy regarding compliance for maintaining a drug-free workplace.

(11) Vendor understands and acknowledges that the representations within their proposal are material and important, and will be relied on by the State in evaluation of the proposal. Any vendor misrepresentations shall be treated as fraudulent concealment from the State of the true facts relating to the proposal.

(12) Vendor must certify that any and all subcontractors comply with Sections 7, 8, 9, and 10, above.

(13) The proposal must be signed by the individual(s) legally authorized to bind the vendor per NRS 333.337.

Telecommunications Development Corp.
Vendor Company Name

Vendor Signature

James Woodyard — 6/15/2017
Print Name — Date

This document must be submitted in Tab IV of vendor's technical proposal

D. Vendor Licensing Agreements / Maintenance Agreements

The following is a copy of TDC's Basic Business License.

GOVERNMENT
OF THE
DISTRICT OF COLUMBIA
Muriel Bowser, Mayor

Department of Consumer and Regulatory Affairs
Business License Division
1100 4th Street S.W.
Washington DC 20024

Date Issued: 11/19/2015
Category: 4003
License#: 69011623
License Period: 12/1/2015 - 11/30/2017

BASIC BUSINESS LICENSE

Billing Name and Address:
TELECOMMUNICATIONS DEVELOPMENT CORP

1919 13TH ST NW
WASHINGTON, DC 20009

Premise/Application's Name and Address:
TELECOMMUNICATIONS DEVELOPMENT CORP

1919 13TH ST NW
WASHINGTON, DC 20009

Registered Agent's Name and Address:
JAMES WOODYARD

1919 13TH ST NW
WASHINGTON DC20009

Owner's Name
Corp. Name TELECOMMUNICATIONS DEVELOPMENT CORP
Trade Name

CofO/HOP#: CO1000683	SSL: 0274 0119	Zone: R-4	Ward: 1	ANC:1B	PERM NO.
		UNITS: 0			

Description Details -
General Business Licenses

General Business - General Business Licenses

-- THE LAW REQUIRES THIS LICENSE TO BE POSTED IN A CONSPICUOUS PLACE ON THE PREMISES --

Melinda Bolling
Director:
Melinda Bolling

*License Effective from the later of Issued or Start of License-Period Date

COPYGARD CAPTURE® ANTI-FRAUD PROTECTION

E. Certifications / Licenses

The following is the Salesforce.com Technical Architect Certificate for project team member Babu Palanisamy.

Salesforce.com Certified Technical Architect

PRESENTED TO

BABU PALANISAMY

FOR SUCCESSFULLY COMPLETING CERTIFICATION REQUIREMENTS
ISSUED MAY 3, 2013
CERTIFICATION NUMBER: 1392908

MARIA MARTINEZ, EXECUTIVE VICE PRESIDENT
CUSTOMERS FOR LIFE
SALESFORCE.COM

V. Vendor Certification of Compliance

The following is a copy of Attachment B, Vendor Certification of Compliance with an original signature from an individual authorized to bind the organization.

ATTACHMENT B – VENDOR CERTIFICATION OF COMPLIANCE

I have read, understand and agree to comply with ***all*** the terms and conditions specified in the attachments noted in the table below.

Vendors must initial next to each noted attachment and then sign with an original signature in the designated space.

Attachment	Attachment Title	Agree to Comply *Initials Required*
A	Confidentiality and Certification of Indemnification	JW
C	Vendor Certifications	JW
D	Contract for Services of Independent Contractor	JW
E	Insurance Schedule for RFP 3422	JW
I	Certification Regarding Lobbying	JW

Telecommunications Development Corp.
Company Name

Signature

James Woodyard
Print Name

6/15/2017
Date

This document must be submitted in Tab V of vendor's technical proposal

VI. System Requirements

The following sections outline TDC's proposed solution to provide a new Records Management System to the Nevada Taxicab Authority.

A. Vendor Response to System Requirements

TDC proposes to implement Salesforce to meet the needs sets forth by the Nevada Taxicab Authority. For the purpose of this project, TDC is teaming with PracticeVantage. TDC and Practice Vantage have a proven record of success having recently completed two (2) phases of implementation of Salesforce with the District of Columbia Department of For Hire Vehicles as the system of record for the management of all data associated with driver licensing and renewal, taxi and limousine registration and renewal, and all complaint and agency inquiry case management. As TDC's subcontractor, PracticeVantage will perform tasks associated with Salesforce development and will be responsible for approximately 35% of the work.

With the world's leading cloud platform, Salesforce is freeing government data from legacy systems and unleashing staff, partners, and citizens to administer government in powerful new ways. In the public sector, Salesforce's trusted cloud platform and applications help government employees and agencies collaborate easily and connect with citizens and partners like never before. Organizations around the globe are leveraging Salesforce's leading cloud solutions and experiencing incredible results ranging from more connected customer service, to streamlined operations, better performance, and overall cost savings. A few representative customer use cases are provided below:

- **District of Columbia Department of For Hire Vehicles (DFHV)** provides services to approximately 8,500 taxicab drivers including 1,400 independent owner operators and 116 taxicab companies who together operate 6,500 taxis and 103 independent limousine drivers and 27 limousine companies. DCTC participates in and/or conducts adjudication services and imposes fines from complaints that are filed against taxicab drivers. DCTC Public Vehicle enforcement (Hack) Inspectors conduct daily taxicab inspections. DCTC also resolves more than 1000 customer complaints annually and responds to more than 6,000 inquiries annually about lost items. The DFHV has recently completed two (2) phases of implementation of Salesforce to functionally replace multiple legacy applications used in support of the licensing and renewal of all taxi and limo drivers, and the registration and renewal of all taxi and limousine vehicles. The Salesforce platform is used in support of all DFHV client services operations, and the project additionally included the implementation of a portal for companies and drivers to facilitate remote processing of applications and renewals. Salesforce is used to track and manage all constituent complaints, as well as agency inquiries and investigations.
- **Texas Department of Motor Vehicles (TxDMV)** manages the state's motor vehicle services including registering and titling passenger vehicles, granting operating authority to commercial motor carriers, regulating the motor vehicle sales and distribution industry, and overseeing the integration with internal and external partner applications. TxDMV desired to replace their existing Licensing, Administration, Consumer Affairs and Enforcement (LACE) application with a

modern, highly configurable web-based application that is easy to support and update based on business, policy and legislative needs. TxDMV selected Salesforce to meet its current requirements. Salesforce will provide self-service functionality enabling TxDMV to improve service turnaround time, increase consistency of service, and reduce the simple service request workload of employees. Additionally, TxDMV related information will be shared among other state agencies easier and faster. Salesforce's case management functionality will be used to manage licensing activities of users and to track litigated contested cases arising from disputes and complaints.

- **Indiana Bureau of Motor Vehicles (BMV)** is responsible for registering every vehicle and licensing all drivers in the state of Indiana. Previously communicating with Indiana drivers via paper notifications was a time-intensive, costly proposition. The Indiana BMV desired a solution that would support their high volume communications with greater ease and efficiency and less overhead. The Salesforce Marketing Cloud provided the solution to the Indiana BMV's cost and communications needs. With Email Automation, the Indiana BMV has developed a digital customer journey that guides users through the vehicle registration and licensing process, as well as providing agency updates and special offers. The Indiana BMV's digital solution lets them acquire, onboard, engage, and retain customers with automated campaigns that keep customers informed and up-to-date. By investing in the Salesforce Marketing Cloud and automating their emails, the Indiana BMV has seen measurable success. In 10 months, the BMV saved $133,000 with customers opting in to digital communications and eliminating paper waste.
- **New York City Department of Buildings** created a dual-facing back-office and mobile inspection app built on the Salesforce Platform. The back-office app includes everything needed to administer inspection including a centralized inventory inspections and permits on each building, inspection history, payments, etc. The mobile app replicates the physical clipboard so it functions the same, however, the app streamlines the entire inspection process. It automates the scheduling of inspections for inspectors and using color bands, provides a quick indication of where and what work needs to be done. It includes a check-off list that changes colors as inspectors change items on list. The app also allows inspectors to up-load notes to the buildings record real-time and it integrates Google Maps to show inspection locations. Digital Geo Signatures captures the location and time of day of the inspection and signatures also moves inspection to the next stage of the process.
- **State of Minnesota** currently has a "License Minnesota" website, www.license.mn.gov, which allows citizens to find information on nearly 600 businesses, professional, recreational, or vehicle licenses from 45 Minnesota State Agencies and Boards. The site describes each license requirement, fees, and application process, and links to a paper form or online application process. The State of Minnesota Office of MN.IT Services is deploying an e-licensing system powered by the Salesforce Platform with integrated payment using US Bank Payment Gateway. This system will support online application submission and back office management for five key State Agencies. The Minnesota Enterprise e-Licensing System (ELS) will extend License Minnesota's functionality to allow citizens to apply for and renew online their

professional/occupational licenses and business/commercial licenses through a single entry point or gateway.

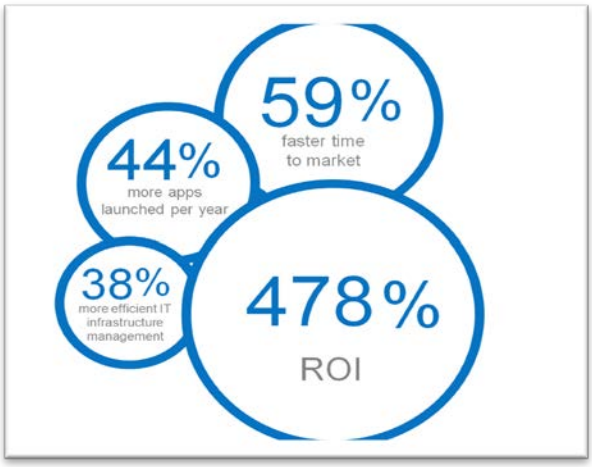
- **Massachusetts Department of Public Safety (DPS)** has regulatory, licensing and inspection oversight of a wide range of activities, businesses, and professions. In March 2013, DPS issued a solicitation seeking an inspection and permitting system for the following business units within DPS: Building Permits and Inspections for all Commonwealth owned buildings, some hospitals and clinics and other private uses; Engineering Inspections and Permits; Elevator Inspections and Permits; Amusement Inspections and Permits; Inspections governed by the Board of Building Regulations and Standards (BBRS); Architect Access Board (AAB); and certifications and inspections. DPS is comprised of several divisions; building, engineering, elevators, regulated activities and architectural access, each with different, but similar, inspection and permitting needs. In partnership with a systems integrator, the project is to provide and deploy a turnkey COTS solution for a browser-based inspections and permitting system with a revenue collection service to support the business operation of DPS. The DPS vision was to consolidate outdated and inefficient technology and databases used to support the business processes with a fully developed and mature permitting and inspections system. The BasicGov solution provides DPS the ability to track inspections, complaints, investigations and enforcement and appeals actions, mobile capabilities, ad-hoc reporting, online payments integrated with HP ePay and Bank of America, workflow triggers, and a secure user portal amongst other functionalities. Major benefits for DPS include streamlined processing, more-timely revenue collection and reporting via an interface to the Commonwealth's Massachusetts Management Accounting and Reporting System (MMARS), integrated reporting, and a creation of a complete customer database for inspectional and oversight purposes. For the public, benefits would include convenient permit application and scheduling of inspections.

B. Computing Platform

Based on the established requirements, the TDC team is proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.

Salesforce enables customers to achieve significant up-front savings relative to the traditional enterprise software model. Customers benefit from the predictability of their future costs since they generally pay for the service on a per subscriber basis for the term of the subscription contract. Because Salesforce deploys all upgrades on Salesforce servers, new features and functionality automatically become part of the Salesforce service (on the upgrade release date) and therefore benefit all Salesforce customers immediately.

Independent studies conducted by leading Industry Analysts such as Gartner, Forrester and IDC (International Data Corporation) show the cost effectiveness and the large ROI potential of the Salesforce Platform. In IDC's recent Study published in July 2016, the following key Business Value results were cited:



- 478% five-year ROI
- 7 month break-even point
- $242,272 in business benefits per 100 users per year
- 50% faster application development life cycle
- 59% less time to release new application or feature
- $55,100 of additional revenue per year per 100 users
- 38% more efficient IT infrastructure management
- 44% more new apps developed per year

C. Technical Requirements

Salesforce is a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.

Government Trusted Security & Reliability

The Salesforce multi-tenant, cloud platform architecture enables us to leverage a common infrastructure and software code base across all clients who benefit from access to the most current release of the application, periodic upgrades, more rapid innovation, and the economies of a shared infrastructure.

Salesforce understands that the confidentiality, integrity, and availability of customer information are vital to their business operations and success. TDC uses a multi-layered approach to protect that key information, constantly monitoring and improving applications, systems, and processes to meet the growing demands and challenges of security.

Independent audits confirm that security goes far beyond what most companies have been able to achieve on their own. Using the latest firewall protection, intrusion detection systems, and TLS encryption, Salesforce Force.com Platform gives clients the peace of mind only a world-class security infrastructure can provide.

Third-party validation

Security is a multidimensional business imperative that demands consideration at every level, from security for applications to physical facilities and network security. In addition to the latest technologies, world-class security requires ongoing adherence to best-practice policies. To ensure this adherence, Salesforce continually seeks relevant third-party certification, including ISO 27001, the SysTrust audit (the recognized standard for system security), and SSAE 16 SOC 1 audit (an examination and assessment of internal corporate controls, previously known as SAS 70 Type II). SOC1, SOC2 and SOC3 audits are performed by third party auditors annually at a minimum. Additional audits and certifications include: FedRAMP Authority to Operate from Department of Health and Human Services for the Salesforce Government Cloud and PCI DSS.

Salesforce Government Cloud

Salesforce was the first Cloud Service Provider to attain FedRAMP Authority to operate for both Software as a Service (SaaS) and Platform as a Service (PaaS), consistent with the FedRAMP moderate baseline controls.

On May 23, 2014 Salesforce achieved a FedRAMP Agency Authority to Operate at the moderate impact level issued by Health and Human Services (HHS) for the Salesforce Government Cloud. Testing for the ATO was performed by a third party assessment organization (3PAO). The Salesforce Government Cloud information system and authorization boundary, is comprised of the Force.com Platform*, Analytics Cloud, Health Cloud, Salesforce Services (Sales Cloud, Service Cloud, Chatter, Work.com, as well as, features of these applications including Content, Ideas, Knowledge, Chatter messenger, Chatter files, customer facing Chatter groups, Chatter answers, Salesforce Platform Encryption, Event Monitoring) and Salesforce Industry Applications, as well as, the backend infrastructure (servers, network devices, databases, storage arrays) that support the operations of these products, referred to as the General Support System (GSS).

The Salesforce Government Cloud is a partitioned instance of Salesforce's multi-tenant Community Cloud infrastructure, specifically for use by U.S federal, state, and local government customers, U.S. government contractors, and Federally Funded Research and Development Centers (FFRDCs). The isolated Production infrastructure supporting the Salesforce Government Cloud Customer Data ensures that the physical hardware in Salesforce's colocation data centers that process, store, and transmit unencrypted Government Customer data are separate from hardware supporting other customers. While isolated, the underlying infrastructure supporting the Salesforce Government Cloud is the same trusted architecture model that supports Salesforce's multi-tenant public cloud offering and over 4 billion customer transactions a day.

To obtain compliance with FedRAMP, Salesforce conducted security assessment and authorization activities in accordance with FedRAMP guidance, NIST 800-37, and HHS guidance. As part of this process Salesforce documented a System Security Plan (SSP) for the Salesforce Government Cloud service offering. The SSP is developed in accordance with NIST SP 800-18, Guide for Developing Federal Information System Security Plans. The SSP identifies control implementations for the GSS and in-scope customer facing products (Salesforce Platform, Salesforce Applications) according to the FedRAMP moderate baseline and HHS security control parameters. A security assessment of the information system was conducted by a third party assessment organization (3PAO) in accordance with NIST 800-53 and FedRAMP requirements. The security assessment testing determined the adequacy of the management, operational, and technical security controls used to protect the confidentiality, integrity, and availability of the Salesforce service and the Customer Data it stores, transmits and processes.

To maintain compliance with FedRAMP, Salesforce conducts continuous monitoring. Continuous monitoring includes ongoing technical vulnerability detection and remediation, remediation of open compliance related findings, and at least annual independent assessment of a selection of security controls by a third party assessment organization (3PAO). As part of the FedRAMP annual assessment, Salesforce is now aligned with NIST 800-53, Rev. 4 control.

Protection at the application level

Salesforce protects customer data by ensuring that only authorized users can access it. Administrators assign data security rules that determine which data users can access. Sharing models define company-wide defaults and data access based on a role hierarchy. All data is encrypted in transfer. All access is governed by strict password security policies. All passwords are stored in SHA 256 one-way hash format. Applications are continually monitored for security violation attempts.

Protection at the facilities level

Salesforce security standards are on par with the best civilian data centers in the world, including the world's most security-conscious financial institutions. Authorized personnel must pass through five levels of biometric scanning to reach the Salesforce system cages. All buildings are completely anonymous, with bullet-resistant exterior walls and embassy-grade concrete posts and planters around the perimeter. All exterior entrances feature silent alarm systems that notify law enforcement in the event of suspicion or intrusion. Data is backed up to disk. Backups do not physically leave the data center.

Protection at the network level

Multilevel security products from leading security vendors and proven security practices ensure network security. To prevent malicious attacks through unmonitored ports, external firewalls allow only http and https traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard, and address translation technologies further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication, along with the extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Trust.salesforce.com

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. Trust.salesforce.com is a publicly available site open to all customers. On this site clients will find:

- Live and historical data on system performance
- Up-to-the minute information on planned maintenance
- Phishing, malicious software, and social engineering threats
- Best security practices for the organization
- Information on how to safeguard data

Secure data centers

Data centers provide only power, environmental controls, and physical security. Salesforce employees manage all other aspects of the service at the data centers. Colocation data center personnel do not have network or logon access to the Salesforce systems. Colocation personnel have physical access to

the Salesforce secure server room in the event of an emergency, but do not have keys to the individual racks containing hardware. Data centers maintain a common baseline of physical and environmental controls across data centers.

The exterior perimeter of each anonymous data center building is bullet resistant, has concrete vehicle barriers, closed-circuit television coverage, alarm systems, and manned 24/7 guard stations that together help defend against non-entrance attack points. Inside each building, multiple biometric scans and guards limit access through interior doors and to the Salesforce secure rooms at all times.
Access to Salesforce's secure server rooms in the data center is authorized based on position or role. Additional access controls enforced by an electronic key box are implemented for the dedicated Salesforce Government Cloud racks to ensure that access is limited to Qualified U.S. Citizens. Salesforce has an established process to review data center access logs to the server room. Additionally, an at least annual assessment of the data center is performed to ensure the data centers are meeting Salesforce's security control requirements.

In addition to securing the data center locations, it is critical that the data center facilities maintain robust critical infrastructure to support Salesforce through the following services:

Temperature and Humidity Controls

- Humidity and temperature control
- Redundant (N+1) cooling system

Power

- Underground utility power feed
- Redundant (N+1) CPS/UPS systems
- Redundant power distribution units (PDUs)
- Redundant (N+1) diesel generators with on-site diesel fuel storage

Secure Network Logistics

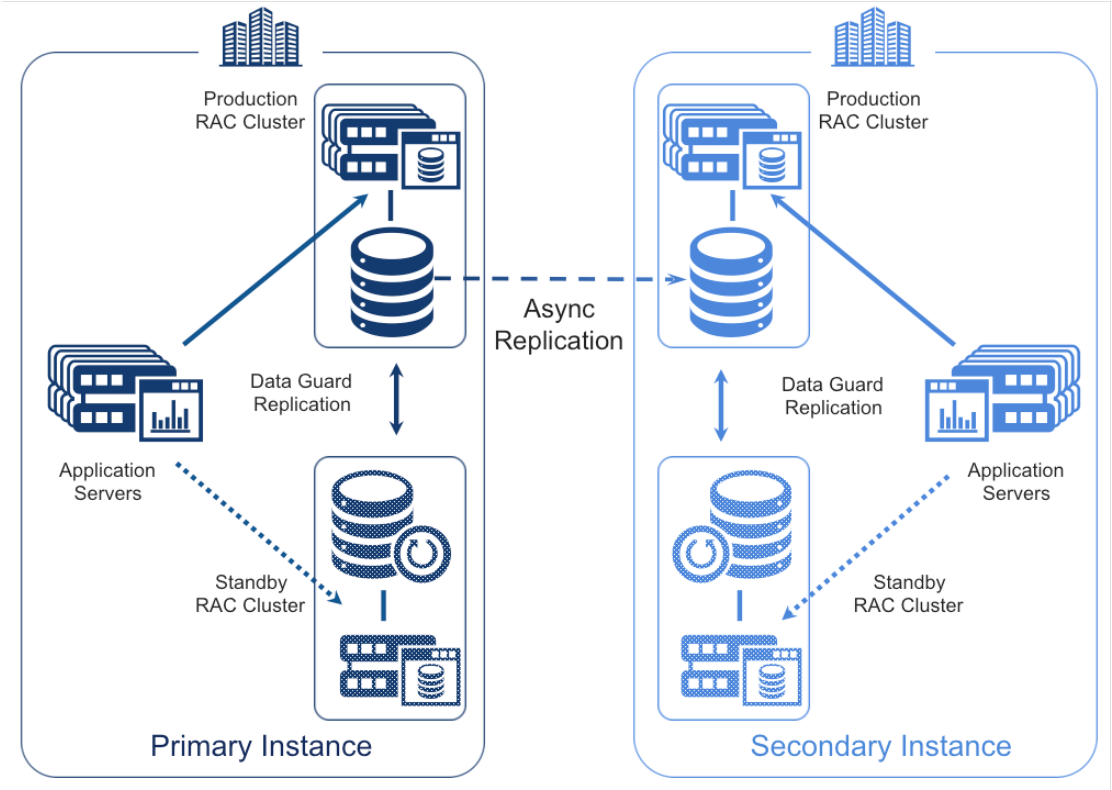
- Concrete vaults for fiber entry
- Redundant internal networks
- Network neutral; connects to all major carriers and located near major Internet hubs
- High bandwidth capacity

Fire Detection and Suppression

- VESDA (very early smoke detection apparatus)
- Dual-alarmed, dual-interlock, multi-zone, pre-action dry pipe water-based fire suppression

Disaster Recovery

Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned at an archive data center. Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (an MPLS network across all data centers). Backups are retained for 90 days. Backups never physically leave secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.



Encryption Capabilities

Salesforce has many customers that are subject to laws pertaining to the processing of personally identifiable information (PII) or personal data. Salesforce offers its customers a broad spectrum of functionalities and customer-controlled security features that its customers may implement in their respective uses of the Salesforce services. Salesforce believes that these provide its customers the flexibility to comply with laws with stringent privacy and security requirements.

Data In Motion

All transmissions between the user and the Salesforce Services are TLS encrypted with a 2048-bit Public Key. The Services use International/Global Step Up TLS certificates, with AES 256-bit encryption by default.

Data At Rest

Salesforce includes a feature to encrypt custom text fields (ECF):

- The fields can be masked appropriately for specific data types (i.e., credit card number, Social Security Number, National Insurance Number, Social Insurance Number).
- Users that cannot see the data will see an input mask which can be configured to partially reveal some of the value if required (e.g. the last 4 digits of a credit card number).
- Access to read the masked parts of the fields is limited by the "View Encrypted Data" permission, which is not enabled by default.
- Customers can manage their encryption key based on their organization's security needs and regulatory requirements.

- Encrypted fields are encrypted with 128-bit keys and use the AES (Advanced Encryption Standard) algorithm.

Additional Salesforce Encryption Capabilities
Apex Code extends the powerful and proven success of the Force.com platform by introducing the ability to write code that runs on Salesforce servers. This language makes possible the development of a new class of application and features deployed entirely on demand. Using Apex, the TA can create user interface classes that utilize the Apex crypto class to encrypt field level data up to AES 256-bit encryption.

Salesforce Platform Encryption
Salesforce Platform Encryption sets up in minutes, with no additional hardware or software, and uses native strong, standards-based encryption. Platform Encryption provides an extra layer to Salesforce's security while enabling customers to enjoy business critical Platform features, such as search, workflow, and validation rules.

The TA can use Platform Encryption so that the TA's organization can confidently prove compliance with privacy policies, regulatory requirements, and contractual obligations for handling private data.

Platform Encryption offers native platform encryption and key management features. The TA's data is encrypted at rest using a hardware security module-based key derivation system. The features allows the TA to protect data at a more granular level than Classic Encryption.

While still giving users the ability to perform necessary tasks, the TA can:

- Encrypt files and attachments (including email attachments).
- Encrypt certain standard and custom fields.
- Encrypt Knowledge article fields and attachments
- Use an advanced key management system.

Platform Encryption helps address some concerns about protecting confidential information. It prevents sensitive data from residing in clear, decipherable form and allows customers to manage tenant secrets, which are used to derive the keys that protect user data. Salesforce is committed to high security standards and offers multiple data encryption options. Customers who want to adopt or extend their use of Salesforce can consider using Platform Encryption to comply with various standards.

Password Policies
User provisioning and management is performed through the Salesforce Administrative Setup environment. Users, their profiles, permissions and passwords may be managed, edited, activated and deactivated as needed by those with appropriate permissions. A TA administrator with appropriate privileges can manage session timeout, password policies, IP range login restrictions, delegated authentication/SSO, and requirements as part of this process. On first time login or password reset request, users are required to change their passwords to gain access.

By default, initial Salesforce user passwords are sent to the email ID on record for that user as stored in the Salesforce application. These passwords are only valid for the initial login. There are several settings that can be configured to ensure that user's passwords are strong:

- Password policies—set various password and login policies, such as specifying an amount of time before all users' passwords expire, the level of complexity required for passwords, and so on.
- User password expiration—expire the passwords for all the users in an organization
- User password resets—reset the password for specified users.
- Login attempts and lockout periods—if a user is locked out of Salesforce due to too many failed login attempts, a system administrator can unlock them.
- A password cannot contain a user's User Name and cannot match his/her first or last name.

For all editions, a new organization has the following default password settings:

- A password must contain at least eight characters.
- A password must contain at least one alphabetic character and one number.
- The answer to the question posed if a user forgets their password cannot contain the password.
- The last three passwords are remembered and cannot be reused when changing the password.

The customer's organization administrator can set the password requirements noted as configurable below:

- Password expiration can be set for 30, 60, 90, 180 days, 1 year, or Never
- Password history may be set to anywhere from 1 to 24 passwords remembered, or none
- Minimum password length may be set between 5 and 50 characters
- Password complexity can restrict the user to a mix of alpha and numeric characters, or alpha, numeric and special characters. Alternatively, password complexity may be disabled allowing any password value.
- User account lock may be set to 3, 5, or 10 attempts before lockout (this feature may be disabled as well)
- Lockout effective period may be set to 15, 30, 60 minutes or Forever (administrator must reset password)

Additionally, sessions may be configured to timeout after 15 minutes up to 12 hours of inactivity, at which time the user is automatically logged out.

Forgot Password Assistance

Salesforce employees do not have access to customer's user passwords. When users lose their passwords, they can click the "Forgot your password" link on a failed login page to receive a new password via email. They must correctly answer a previously defined security question before they can reset their password and log in. The TA can customize the page where the user answers the security question with additional information about where to go to for help. Alternatively, system administrators can reset passwords for users by going through the Setup page.

Real-time, Powerful Analytics

The Salesforce solution includes a powerful suite of analytics and reporting tools to help users view and analyze data that can be accessed via the web or mobile device in real-time. Analytic capabilities consists of several integrated parts:

Report Types

A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of predefined standard report types; administrators can create custom report types as well. For example, an administrator can create a report type that shows only job applications that have an associated resume; applications without resumes won't show up in reports using that type. An administrator can also show records that may have related records—for example, applications with or without resumes. In this case, all applications, whether or not they have resumes, are available to reports using that type.

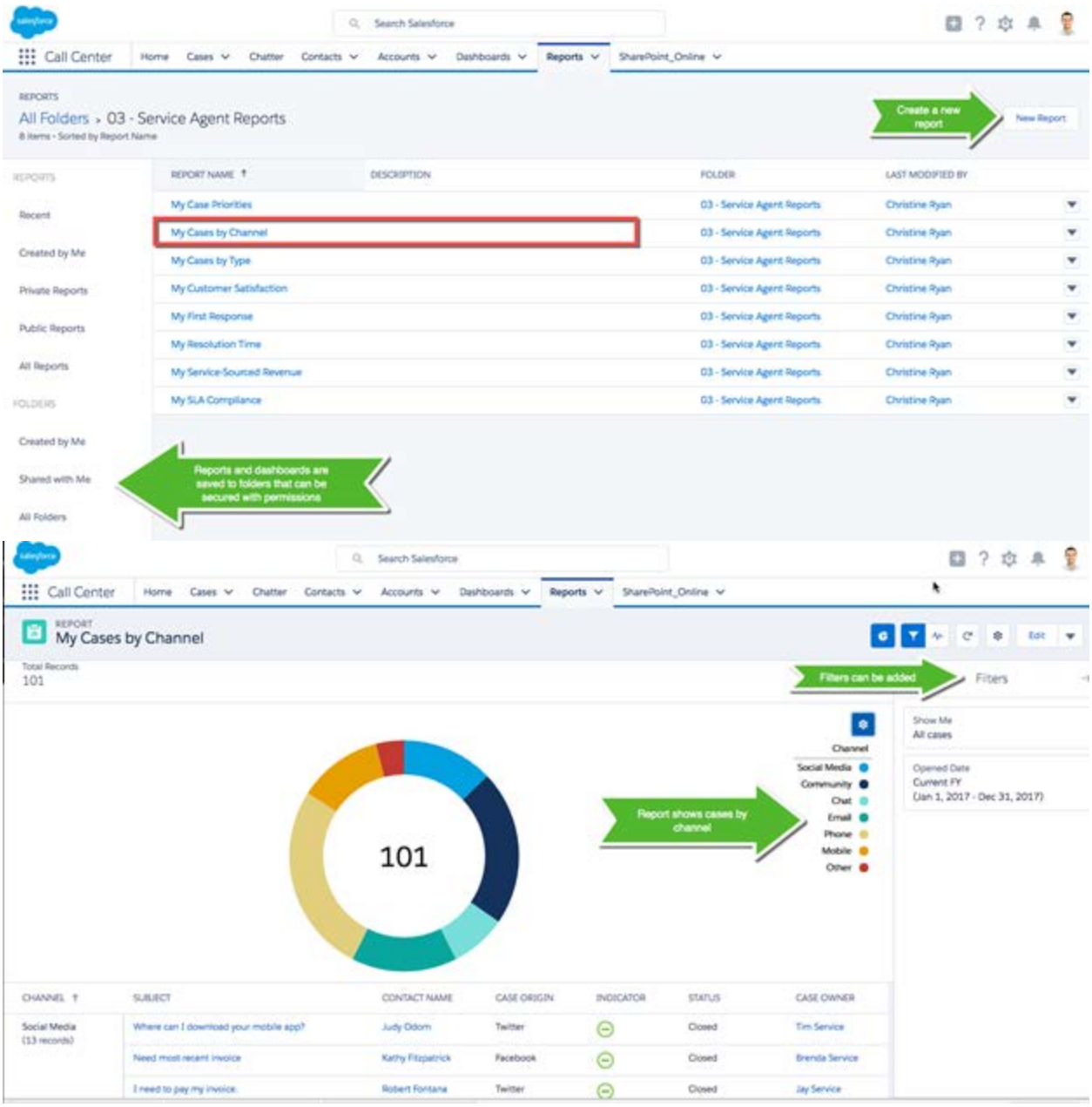
Report Formats

Salesforce reports can use the tabular, summary, matrix, or joined format: Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row.

- Tabular reports are best for creating lists of records or a list with a single grand total. Examples include contact mailing lists and activity reports.
- Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. This type of report can be used to show subtotals based on the value of a particular field or when a hierarchical list is desired, such as all cases for any team, subtotaled by Status and Owner.
- Matrix reports are similar to summary reports but allow users to group and summarize data by both rows and columns. This type of report can be used for comparing related totals, especially if there are large amounts of data to summarize and users need to compare values in several different fields, or users want to look at data by date and by type, person, or geography. Joined reports let users create multiple report blocks that provide different views of the data. Each block acts like a “sub-report,” with its own fields, columns, sorting, and filtering. A joined report can even contain data from different report types.

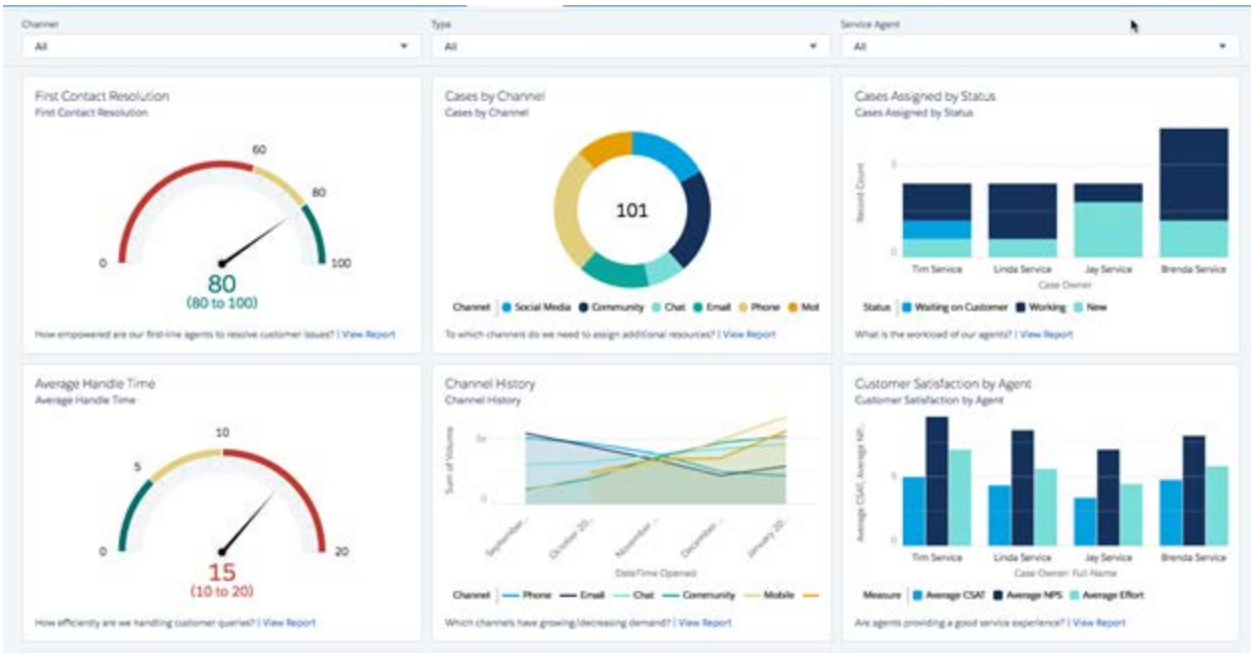
Reports

A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. To help monitor the organization, Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All the Salesforce standard reports are "templates" so they can be used as report starting points from which users can alter fields, criteria, etc. and use the "Save As" function to easily capture a version more specific to their unique needs. Users can also create new custom reports to access exactly the information they need. Subtotal and limit data to help users analyze trends and get a concise picture of what is happening in the organization. Report Builder is intuitive and user friendly. There is no need for IT support or advanced scripting capabilities to run reports.



Dashboards

A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or custom Visualforce pages. They provide a snapshot of key metrics and performance indicators for an organization. Each dashboard can have up to 20 components. Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If a user has access to a folder, the user can view its dashboards. To view a dashboard component, users need access to the folder for the underlying source report. Each dashboard has a running user, whose security settings determine which data to display in a dashboard.



Two other important points about dashboards:

- First, dashboard components aren't simply nice-looking, static pictures. They're live, actionable objects. Users can click on a dashboard component to drill down to the underlying report that generated it, and click on any item in that report to drill down to the source data. So users can quickly understand the reasons behind the results.

- Second, dashboards are full participants in Salesforce's enterprise social collaboration platform. For example, a manager could post a dashboard snapshot to their Chatter feed to share it with their "followers", or to a specific Chatter group, along with comments, so that they can find answers, congratulate team members, or issue calls to action. And both dashboards and Chatter are available on mobile devices, as well as PCs.

Folders

A folder is a place where a user can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. TA supervisors can control who has access to its contents based on roles, permissions, public groups, and license types. TA staff can make a folder available to the entire organization, or make it private so that only the owner has access.

Analytic Snapshots

An analytic snapshot lets end users report on historical data. Authorized users can save tabular or summary report results as snapshots on a schedule. Analytic snapshots let clients work with report data similarly to how users work with other records in Salesforce. For example, a customer support manager could set up an analytic snapshot that reports on the open cases assigned to his or her team every day at 5:00 PM, and store that data in a custom object to build a history on open cases from which he or she could spot trends via reports. Then the customer support manager could report on point-in-time or trend data stored in the custom object and use the report as a source for a dashboard component.

Salesforce Wave Analytics

Salesforce Wave Analytics, is a cloud-based platform designed for the business user to get answers to questions instantly through powerful, interactive visualizations of any data, on any device.

Salesforce core Reports and Dashboards deliver operational and performance metrics on data that lives solely in Salesforce and allows the TA to easily create individual static reports and dashboards to gain real-time views of daily activity.

Salesforce Wave Analytics, on the other hand, is an analytics system - designed to analyze data not just from within Salesforce, but from across different sources, and be surfaced across the TA. Wave Analytics offers:

- Multi-year trending analysis - Supports query and processing of hundreds of millions of rows of data from various sources
- Cross Object analysis and faceting
- Rich data visualization
- Dynamic self-service exploration
- Take action at the point of insight

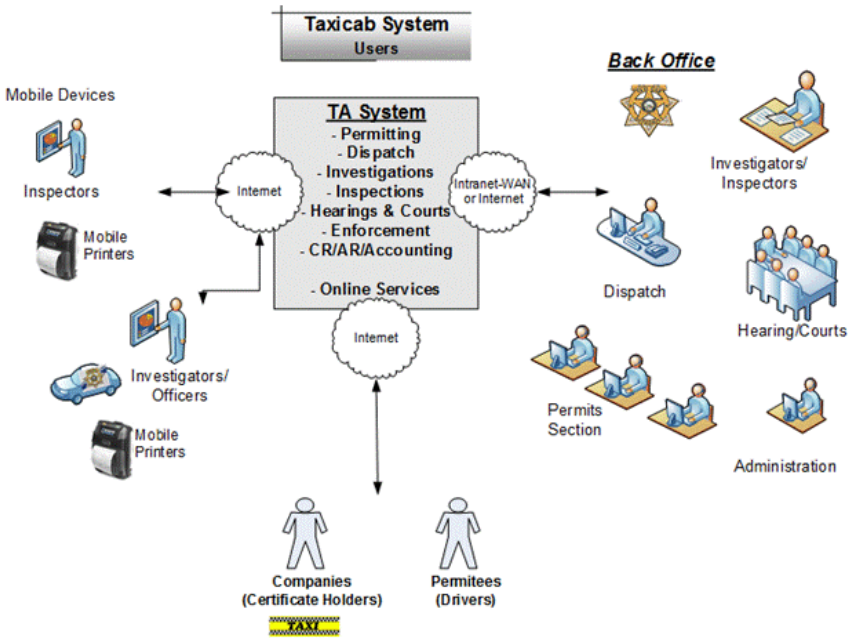
Wave Actions will enable Salesforce users to take actions directly at the point of insight from within any Wave Analytics dashboard. For example, once an agent has uncovered an insight about a case, Service Wave Actions seamlessly connects to Service Cloud workflows and records so that agents can instantly assign a task, escalate a case, update a ticket, or share best practices all within the point of analysis.

Wave Analytics is mobile-ready, and that can immediately collaborate and share insights with team members right inside Salesforce. With Wave Analytics, the TA can quickly query and explore data across CRM, ERP, Excel, as well as social and mobile applications to get exactly the information users need without being stuck in a pre-built report. Unlike legacy Business Intelligence or desktop discovery tools, Wave Analytics is built native in the cloud giving users the advantage of massive scale and taking only weeks to get up and running. The organization's data is secure. Powerful field level security and role based hierarchy controls ensure the right people have the right answers.

With Wave Analytics, it's easy to integrate data from any source, including warehouses, spreadsheets, external data such as SAP or Oracle data, mobile app data, or product sensor data.

D. Functional Requirements

Attachment K has been completed and included in Section F. The proposed solution will support all Taxicab Authority core business functions as set forth in the solicitation.



E. Security Standards

Requirement 4.5.1 sets forth the security standards of transmission of personal information as outlined in NRS 205.4742 and NRS 603A. Salesforce meets the State's security standards for transmission of personal information as outlined in these documents, including the need for encryption of data in motion. All transmissions between the user and the Salesforce Services are TLS encrypted with a 2048-bit Public Key. The Services use International/Global Step Up TLS certificates, with AES 256-bit encryption by default. These documents also include additional terms unrelated to the transmission of personal information. Salesforce assumes that the terms and conditions in NRS 205.4742 and NRS 603A that are not related to the transmission of personal information are not applicable the TA.

Encryption Capabilities

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- The fields can be masked appropriately for specific data types (i.e., credit card number, Social Security Number, National Insurance Number, Social Insurance Number).

- Users that cannot see the data will see an input mask which can be configured to partially reveal some of the value if required (e.g. the last 4 digits of a credit card number).
- Access to read the masked parts of the fields is limited by the "View Encrypted Data" permission, which is not enabled by default.
- Customers can manage their encryption key based on their organization's security needs and regulatory requirements.
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Additional Salesforce Encryption Capabilities

Apex Code extends the powerful and proven success of the Force.com platform by introducing the ability to write code that runs on Salesforce servers. This language makes possible the development of a new class of application and features deployed entirely on demand. Using Apex, the TA can create user interface classes that utilize the Apex crypto class to encrypt field level data up to AES 256-bit encryption.

Salesforce Platform Encryption (Additional Licensing Option)

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Platform Encryption helps address some concerns about protecting confidential information. It prevents sensitive data from residing in clear, decipherable form and allows users to manage tenant secrets, which are used to derive the keys that protect data. Salesforce is committed to high security standards and offers multiple data encryption options. Customers who want to adopt or extend their use of Salesforce can consider using Platform Encryption to comply with various standards.

Salesforce offers both a Production environment and 4 different types of Sandbox environments. This gives the ability to create multiple copies of the system in separate environments for a variety of purposes, such as testing and training, without compromising the data and applications in Salesforce production organization. The usage of the various Salesforce Sandbox types during an implementation varies, but below will provide a description and common use of each type of environment:

Developer Sandbox
Developer sandboxes are designed for a single developer and intended for coding and testing in an isolated environment. These environments include a copy of the production organization's configuration (metadata). Developer sandboxes have a storage limit to 200 MB of data and 200 MB of files, which is enough for many development and testing tasks. The Developer sandbox can be updated once per day.

Developer Pro Sandbox
Developer Pro sandboxes are intended for coding and testing in an isolated environment. These environments include a copy of production organization's configuration (metadata). They have a larger storage limit than Developer sandboxes, up to 1 GB of data and 1 GB of files. The larger limit allows for more robust test data sets and enables this environment to handle more development and quality assurance tasks. Users can refresh a Developer Pro sandbox once per day.

Partial Copy Sandbox
Partial Copy sandbox environments include all of the organization's configuration (metadata) and a subset of the production data that is defined by using a sandbox template. Use Partial Copy sandboxes for virtually any development, testing, or training purpose. The only tasks for which they aren't well-suited are full performance and load testing. Additionally, as defined by the sandbox template, Partial Copy sandboxes can include the organization's standard and custom object records, documents, and attachments up to 5 GB of data and 5 GB of files and a maximum of 10,000 records per selected object. Users can refresh a Partial Data sandbox every 5 days.

Full Sandbox
Full sandboxes are intended to be used as testing environments. Only Full sandboxes support performance testing, load testing, and staging. Full Sandbox environments are a replica of the production organization, including all data—for example, object records and attachments—and metadata. Users can refresh a Full sandbox every 29 days.

Salesforce SDLC
Salesforce's position as an online service enables Salesforce to roll out all levels of improvement, from patch releases to major upgrades that are largely transparent to the end users. When a bug is fixed and tested, it is rolled out to the application as part of regular maintenance; the nature of the service prevents special patches and code branches for individual customers, so all fixes can potentially benefit all customers.

The Salesforce application and service is fully instrumented for health-check monitoring and all errors are reported directly to the development organization at the time they occur—both for investigation and rapid turn-around. This means Salesforce can detect and fix a bug before customers encounter it.

- Planned upgrade releases are accompanied by formal release notes, which document new features and some fixes. (Even during a release cycle, not all features/bug fixes are detailed in release notes.)
- No information is published for patch releases, where most bug fixes occur.
- Bug information is published for the customer audience.

Instead of a multiyear development cycles between releases, as occurs for on-premises software, with its accompanying stream of patches and customer test/install/rollout issues, Salesforce continuously upgrades the service in the background.

F. Requirements Matrix

The Requirements Matrix, Attachment K, has been included as an attachment.

VII. Scope of Work

The following sections detailed TDC's approach to fulfilling all requirements set forth in the RFP.

A. Planning and Administration

In the following sections, TDC responds to RFP sections 5.8 through 5.17.

1. Detailed Project Plan

TDC will work with stakeholders to develop a detailed project plan. The plan will contain fixed deadlines that take into consideration the State holiday schedule. The plan will include the following section:

A. Project Schedule including tasks, activities, activity duration, sequencing and dependencies
B. Project work plan for each deliverable, including a work breakdown structure
C. Completion date for each task
D. Project milestones
E. Entrance and exit criteria for specific project milestones
F. Project organization including a resource plan for defining roles and responsibilities for the awarded vendor, subcontractors, and state

2. Attendance at all Scheduled Meetings

As per the RFP, the TDC project team will attend and participate in all project related meeting requested by the State. Prior to the meeting, TDC will work with the State to develop mutually agreed upon agenda. Preparing materials and briefings will be the responsibility of TDC, and the TDC team will also keep track of the minutes and distribute them following the meeting via email. As part of the project management approach, there are a variety of different meetings required for a successful implementation. In the following sections, TDC will outline various recommended meetings, but the company will also be responsive to any meeting request from the State.

3. Written Semi-Monthly Project Status Report

The TDC approach to project management calls for semi-monthly written project status reports. Per the requirements of the RFP, those reports will be delivered by the third working day following the end of each reporting period. The reporting periods will be the first to 15th of each month followed by the 16th to the end of the month. TDC will work with the State to develop a applicable format.

Per the RFP, the status reports will include, but not be limited to, the following information:

1. Overall completion status of the project in terms of the State approved project work plan and deliverable schedule
2. Accomplishments during the period, including State staff/stakeholders interview, meetings held, JAD sessions and conclusions/decisions determined
3. Problems encountered and proposed/actual resolutions
4. What is to be accomplished during the next reporting period
5. Issues that need to be addressed, including contractual
6. Quality Assurance status

7. Updated MS Project timeline showing percentage completed tasks assigned, completed and remaining
8. Identification of any schedule slippage and strategy for resolution
9. Contractor staff assigned and their location / schedule
10. State resources required for activities during the next time period
11. Resource allocation percentages including planned versus actual by project milestone

4. Communication Plan

As part of the TDC project management approach, the project team will define and develop a comprehensive Project Communication Plan. The plan will serve as a guide for internal and external communication throughout the life of the project and will be updated as the communication needs change. The plan also will identify roles of the personnel involved in the project and create a project team directory to provide contact information for all stakeholders involved in the project.

The Project Manager will take a direct role in ensuring effective communication on this project. The Project Communication Plan will be used as a guide for what information to communicate, who initiates the communication, when to communicate, and to whom to communicate.

Like most project plan documents, the Project Communication Plan will be a living document. During the course of the project, updates and changes may be required. The Project Manager will be responsible for managing all proposed and approved changes to the plan. If a change is approved, the Project Manager will update the plan and distribute the new documentation to all stakeholders. The Project Manager will also be responsible for documenting changes, storing the plan and finally disposal of the plan.

5. Risk Management Plan

The purpose of the Risk Management Plan is to create the framework for the project team to identify risks and develop strategies to avoid and mitigate risk. The TDC approach to risk management is a methodical process by which the team identifies and ranks various risks. The project team members assigned to manage risk will provide status updates on their assigned risks during team meetings. The Project Manager will then analyze each risk and identify any possible improvements that can be made to avoid or mitigate risk.

Risk Identification

Risk management beings with the initial project risk assessment meeting. TDC will employ the Crawford Slip method to identify potential risks. The Project Manager will lead the risk assessment meeting and encourage all team members to identify as many potential risks as possible. These potential risks are then recorded as part of the risk register and the team will review TDC's project archive of similar projects to determine commons risks and associate mitigation strategies.

Risk Tracking/Monitoring/Reporting/Reviewing

Since potential risks will be added to the risk register, they will be monitored during the entirety of the project. Each specific potential risk will be assigned a risk manager. During project team meeting the risk manager for each topic will give a status report. Risk monitoring will be a continuous process throughout

the life of the project. The Project Manager will monitor the project schedule to ensure that any new risks are assigned to a risk manager.

Risk Mitigation/Contingency

The Project Manager will work with the assigned risk managers to develop avoidance and mitigation strategies. The team will then determine the best way to respond to each risk to ensure compliance and success. When creating the risk register, the project team will identify all possible risk, probability of occurrence, potential impact and a mitigation strategy.

6. Quality Assurance Plan

The TDC approach to quality management ensures quality is planned for both the final product and the contemporary processes as a function of a process of continuous improvement. Quality must always be planned into a project in order to prevent unnecessary rework, cost and time. In order to meet quality goals, TDC will utilize an integrated approach that defines quality standards, measures quality and continuously improves quality over the course of the operation. These methods will also ensure the quality of the code, workmanship, project schedules and subcontractor activities.

Quality Standards

Product quality means that the newly implemented system will meet or exceed the end user's standards and criteria for success. The TDC focus will be to ensure that the product meets established quality standards and client satisfaction.

Process quality describes the overall experience of those using the final product. TDC will establish standards that make sure all activities conform to the organizational standards of the agency.

The quality standards and requirements will be determined by the project team and quality group. These standards will primarily be based on Nevada's documented standards for the RMS system. There may be product-specific quality standards identified that are not currently part of the documented organizational standards. In this case, the quality group will review these newly identified standards and incorporate them into organizational documentation when approved. The project team will also document any newly identified quality standards and ensure communication with all stakeholders.

Quality Assurance

The Project Manager and the project team will perform assessments at planned intervals throughout the project to ensure all processes are being correctly implemented and executed. Key performance metrics for the RMS system will be monitored. The established project tolerances for these metrics are the organizational standards for all other agencies similar to the Taxicab Authority.

The Quality Manager will provide day to day quality management and conduct process audits on a weekly basis, monitor process performance metrics, and assure all processes comply with project and organizational standards. If discrepancies are found, the Quality Manager will meet with the Project Manager and review the identified discrepancies.

Process improvement is another aspect of quality assurance. Quality assurance reviews, findings, and assessments should always result in some form of process improvement and, as a result, product improvement. All process improvement efforts must be documented, implemented, and communicated to all stakeholders as changes are made.

The TDC team will employ a structured process for quality assurance and continuous improvement. This process will initially be driven by information provided by Nevada stakeholders and program managers as a function of the discovery, outreach, enrollment and engagement tasks that will occur during Transition. The TDC team will document a process for on-going, long-term quality assurance and continuous improvement of the new system for the State.

The TDC team has direct, relevant Operational Management experience designing and implementing Quality Assurance and Continuous Improvement (QA/CI) activities into Taxicab Authority programs similar to the system being implemented. The approach is modeled in Lean Six Sigma practices, and is designed to improve the Program in a systematic way, employing the Define, Measure, Analyze, Improve and Control (DMAIC) framework.

Define: Identify the inherent process risks (i.e., what could go wrong, and what impact might there be). The goal is to make certain everyone involved knows their role, why they're doing specific activities and what we're trying to achieve.

Measure: The project team will also measure through the establishment of Service Level Agreements (SLAs) and Key Performance Indicators (KPIs), the effectiveness of the Program – ensuring that the work gets done and evaluating how well it is done.

Analyze: TDC team members will routinely meet, internally as well as with the Taxicab Authority and other stakeholders to review information obtained to evaluate the effectiveness of the system, identify potential causes and get to the proper root cause of issues or concerns.

Improve: As necessary and appropriate, key personnel implement required control activities which are designed to address the issues by mitigating risks and/or improving the processes.

Control: Finally, the TDC team maintains responsibility for ensuring the effectiveness of the system through its ongoing monitoring and oversight activities which will not only ensure effective processes (Quality Assurance), but it too will help enable us to early identify areas for improvement (Continuous Improvement).

7. Change Management Plan

TDC employs a modular change management framework built around ten (10) key streams of work. The Organization Change Management (OCM) Toolkit provides an extensive library of methods, tools and templates that act as accelerators in the change program and drive the project team towards achieving value realization. The TDC Change Management Plan will be used for the design, specification, construction, implementation, and support of the system.

The TDC approach to change management requires creating three (3) simple, yet powerful, boundary conditions.

- Understanding of what needs to be done
- Possession of skills and tools necessary to succeed
- Accountability for results

Those guiding principles are integrated with activities and deliverables into the TDC approach. The following table includes all activities and deliverables associated with the TDC approach to change management. This table will be tailored to specific needs and mutually developed with the State.

OCM Activities	Set Direction	Design The Details	Make It Happen	Run It
Change Strategy & Design	• Change Vision • Change Strategy • Change Climate Audit			
Change Program Management	• Change Management Work Plan • People/Organization Risk Analysis	• Monitor Progress v. Plan • Manage Risks & Issues	• Monitor Progress v. Plan • Manage Risks & Issues	• Monitor Progress v. Plan • Manage Risks & Issues
Leadership	• Project Kick Off • Develop Sponsorship Model • Align Leader/Sponsors	• Leadership Assessments • Leadership Alignment & Coaching Leadership Model	• Go/No Go Decision Support Process • Decision Quality	• Leadership Coaching • Learning Feedback & Appraisals
Communication & Stakeholder Eng.	• Stakeholder Analysis • Comm Strategy • Tactical Comm Plan	• Comm Materials & Events as per plan	• Comm Materials & Events as per plan	• Comm Materials & Events as per plan
Job & Org Design	• Governance Model Design	• Post Go Live Support Model Design • Org Design • Job Design/Descriptions Role Mapping		
New Way Of Working	• Preliminary Org Impact Analysis	• Design Validation Session Design RACI/Swim Lane Models System Validation Final Org Impact Analysis	• Bubble Support Model • Bubble Support Scripts & Preparation	
Learning	• Change Strategy	• Learning Needs Analysis • Learning Strategy • Learning Work Plan • Curriculum Design • Courseware Design • Training Environment • Design/Build Schedule/Registration	• Training Delivery • Delivery Trading • Training Feedback and Post Appraisal	• Learning Asset Archival and Sustainment
HR Policy & Practice Alignment	• Project Incentive/ Rewards Strategy & Plan	• HR Policy/Practice Audit	• HR Policy/Practice Revision & Alignment	
Culture	• Culture Audit and As Is/To Be Gap Analysis			• Culture Audit
Tactical Readiness Planning		• Readiness Network Charter Readiness Plan Template Readiness Plan Development and Execution	• Readiness Plan Execution • Readiness Assessments	• Adoption Audit & Post Appraisal
Value Realization	• Value Board • Value Story	• Value Driver Decomposition	• Benefit Owner Mapping Benefit Owner Enrollment	• Benefit Realization Tracking

8. Knowledge Transfer Plan

TDC will develop a Knowledge Transfer Plan. The plan will include sufficient time and resources to accomplish a full transfer of knowledge and ensure that the State can operate the system independently and obtain timely and effective support from TDC.

The TDC approach to knowledge transfers is broken down into four main components:

- Ease role transition efforts
- Capture essential position information
- Group knowledge needs into logical and separate components
- Provide a process to transfer knowledge in a structured manner

In the first stage of knowledge transfer, TDC will define all necessary tasks and responsibilities. Then, each responsibility will be tied to an existing position, role, or employee. At this point, TDC will make sure that the existing employee has the requisite knowledge to perform the task. Finally, TDC will review and validate the knowledge transfers to ensure that the process can continue seamlessly. Following the transition, TDC will remain involved in the process from a support perspective on an as-needed basis.

9. Post Implementation Evaluation Review

Approximately six (6) months following the successful implementation, TDC will perform a Post Implementation Evaluation review (PIER). The review will only begin after the full implementation and the State has accepted all deliverables. The TDC Project Manager will remain on site for a maximum of three (3) days to complete the review.

The TDC approach to post-implementation review is composed of the following seven elements:

- Conduct a gap analysis
- Determine whether the project goals were achieved
- Determine the satisfaction of the stakeholders
- Determine the project's costs and benefits
- Identify areas of further development
- Identify lessons learned
- Report findings and recommendations

The final review document will allow the State to fully realize the benefits of the successful implementation. Following Review, the State should be able to make the most of the benefits delivered by the project.

B. Review and Validate Requirements and Gap / Fit Analysis

The following sections address the RFP requirements for Review, Validation and Gap / Fit Analysis.

1. Gap Analysis Report

TDC will perform a thorough review of relevant Taxicab Authority artifacts and interview key personnel to fully understand the Authority's operation and system requirements. With this knowledge in hand, the project team will then document any and all gaps between the Authority's needs and what the software supports. TDC will not just itemize gaps. As part of the Gap Analysis Report, the project team will also document options to address the gaps including, but limited to, custom development, process work-arounds, and utilization of third party options.

The TDC approach to Gap Analysis consists of three main phases:

Identify Strategic Objectives

In the first phase, TDC will review documents and interview key personnel in order to develop strategic objectives. These objectives will represent what the stakeholders want as the final state of the implemented system.

Identify Current Standings and Deficiencies

TDC will then collect data on the current system as well as the proposed solution. The main emphasis in this step is to determine if there are any gaps between the proposed solution and the ultimate implementation.

Create Action Plan

Once the gaps are identified, TDC will then create an action plan. The plan will provide options to address the gaps. The project team will work with the State to determine which solutions fit best for the stakeholders.

The following is example of Gap Analysis Matrix using the TDC approach.

Strategic Objective	Current Solution	Deficiency / Gap	Action Plan
Objective 1			
Objective 2			
Objective 3			
Objective 4			

2. Implementation Scope Document

After the completion of the Gap Analysis Report, TDC will present the results to the State. Following the presentation, TDC and the stakeholders will determine the best way to move forward and address any gaps. Once a final path forward is finalized, the project team will develop the Implementation Scope Document.

The Implementation Scope Document is necessary to guide a software development implementation project towards successful completion. For the purposes of a Salesforce implementation, TDC's Implementation Scope Document will list the responsibilities for both TDC and the stakeholders for each implementation activity or scope item. A sample component of the Implementation Scope Document is included below:

Implementation Activity / Scope Item	TDC Responsibility	Stakeholder Responsibility

Item 1		
Item 2		
Item 3		

C. System Design / Implementation Configuration

Once the requirements have been finalized and the gap analysis has been completed, TDC will develop specific system design specifications. As set forth in the RFP, TDC will include the following elements of the system design specifications. This list is not considered exhaustive.

- Overall system architecture, including technology that will be used (hardware and software), including any third-party products that will be used
- Configuration parameters, including, but not limited to: lookup values, event triggers, key data fields, user roles, user interface and screen navigation, list of key reports and description on how they will be developed
- Description of administrative functions (technical and non-technical) the TA will need to perform for the ongoing support of the system
- Description of security and backup and recovery methods and technology

D. Setup and Configure / Build System

The following sections detail TDC's approach to establishing the development environment and building the system.

1. Establish Development / UAT

The TDC approach to Salesforce implementation integrates with the values of the Agile Manifesto to lead, serve and innovate. While valuing individuals, TDC simultaneously serves and leads more effectively. The approach does not justify the use of any process or tool simply because "we've always done it that way."

The goal is to produce quality software and iterate on that software. To reach that goal, TDC makes sure to demonstrate the capabilities of the product via working versions. Despite valuing documentation and knowledge disbursement, TDC methods ensure that an effective working product effectively describes itself.

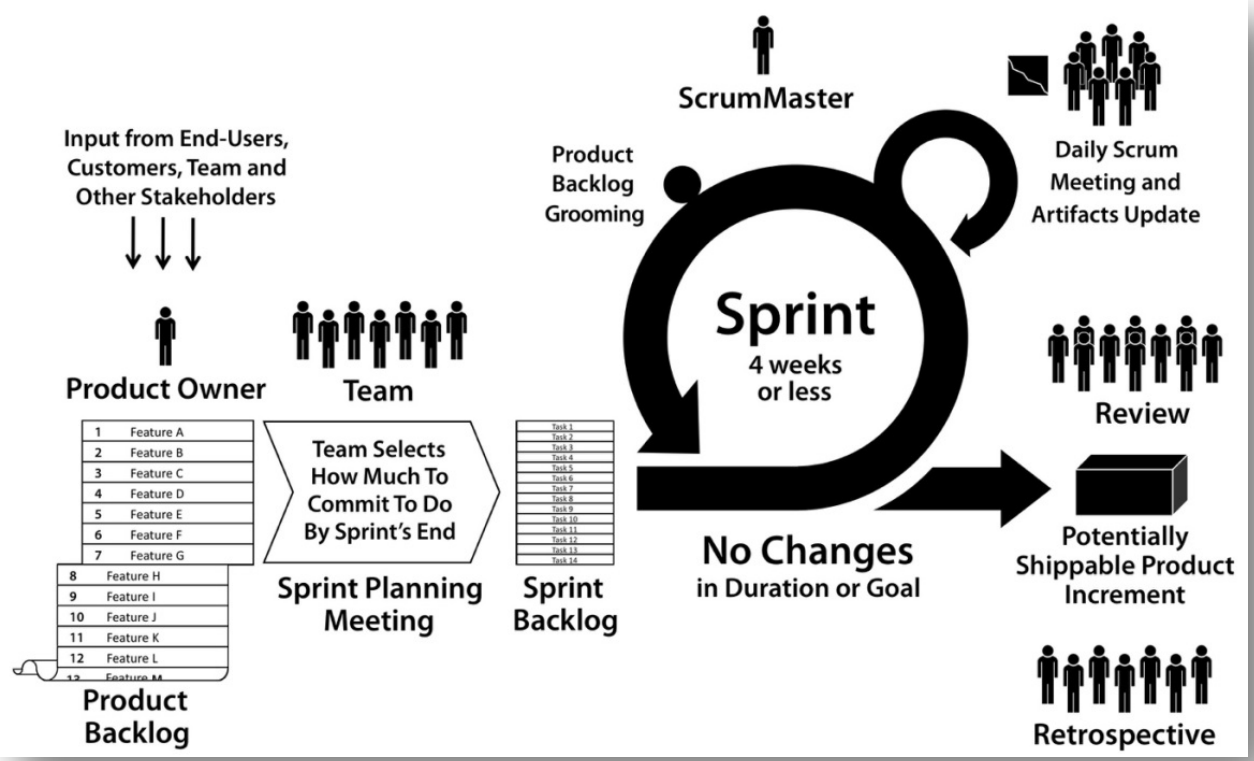
TDC key personnel work closely with internal and external stakeholders, subject matter experts, and others who can help iterate to develop better solutions for clients. Through this process, the project team can strive to find ways to collaborate to constructive ends, to focus on shared values, to decide upon shared goals, and to communicate effectively with any and all collaborators. By valuing in-depth, close collaboration instead of detailed documents or memorandums, the TDC team can serve and satisfy stakeholders without the need for strict contracts

The TDC team applies a five-step Agile methodology to help in planning, development and operations. Working with the Stakeholders and Product Owners, key personnel capture and refine business

processes, streamline them with the Salesforce platform, manage change and ensure that user adoption is to the maximum.

2. Develop Working System

The TDC team will correlate all functional requirements of the TA to user stories. User stories represent a collection of functional requirements that articulate a functional scenario of the TA end user. Some number of user stories collectively will correlate to an individual sprint. Sprint demonstrations will occur monthly and will provide an iterative demonstration of completed functionality. TA project stakeholders will be intrinsically and inextricably integrated into the development process by having access to user stories, sprints and functionality as it is developed within Salesforce.



The TDC team will incorporate key elements from other industry standards such as ITIL, NIST, SafeCode and PMI. The approach is designed to deliver functional software at a rapid pace, reduce costs, and ensure delivery of a workflow-enabled Salesforce solution through iterative release management, code promotion, commercial collaboration, easy system configuration, and compliance with security and records management controls.

Members of the TDC project team are currently applying the Agile methodology at federal agencies, relying on customer and stakeholder input, as well as an existing knowledge base and understanding, to deliver secure, stable, records-compliant products.

The approach incorporates lessons learned from previous engagements and is constantly improving. Most notably, the approach links solution delivery and solution release to allow the Product Owners and Stakeholders to answer the most important questions impacting success, "What amount of change can an organization or customer withstand before negatively impacting user adoption?"

This answer to this will vary from Sprint to Sprint and therefore the delivery model focuses on this as a key driver of the Agile and Change Management processes.

The TDC team has developed a multi-factored approach to estimate user story sizes, schedules, and throughput that is continuously being updated as the team gains more knowledge after each completed project.

By considering multiple factors, such as technical complexity, licensing complexity, organization readiness and security requirements, the Team will assign a point value to each user story to estimate the effort required to implement the feature.

Estimating Factor	Simple Risk Factors	
Technical Complexity	• Complexity of journey maps • Number of persons • Third-party integration	• Number of internal and external users • Number of automated and manual processes
Licensing Complexity	• Types and distribution of licenses (Sales Cloud, Service Cloud, Marketing Cloud, Custom Cloud, Community, Knowledge, and others)	
Organizational Readiness	• Prior history with Agile • Prior history with Salesforce • Clear vision • Organizational leadership and sponsor / champion	• Clear roles, responsibilities, and requirements • Appetite for change • Contract office experience with Salesforce and Agile
Security Requirements	• FISMA Level	• Electronic Signature

Story points are a different way to look at estimating features. They are not a measure of the time needed to complete a feature but a measurement of a feature's size / complexity relative to other features.

This approach is powerful because it allows the project team to compare the sizes of features to each other to determine a relative size. The TDC team uses the values 1, 3, 5, and 8 to assign value to user

stories. User stories are assessed to be greater than 8 on these scales are broken down into several more manageable user stories.

User story points represent all the activities required dispose of a user story, including planning, development, and quality assurance activities.

After conducting this analysis, the team leverages a strong database of projects and compare against completed projects. After each project is completed, TDC updates the database with any new information to assess the accuracy of previous estimates.

The TDC team has found that the expertise brought to bear by experienced Salesforce Architects is invaluable in project estimation. For this project, the team will therefore leverage this expertise as a type of internal consulting expertise that is provided to the Project Manager. This also ensures a true corporate vantage point in project estimation.

Scope is managed through the use of backlog and complexity estimates. The key components to managing scope are vertical slicing (for example, working across UI, data, and business logic layers) and velocity management, which is about sizing feature-sets appropriately and prioritizing the features effectively. There are three primary drivers behind effective Velocity Management:

- All assignable backlog stories and tasks must be sized up to the point where a single Scrum Team can deliver them in a single Sprint, or smaller
- Highest value (return on investment) stories/tasks are worked first unless there is a dependency
- Size may dictate a story/task be placed in a Sprint that is lower priority but is appropriately sized to be completed if none of the higher priority items can be completed in the single Sprint

These estimation analyses are translated into pricing methods by helping to define the roles on the team, team size, and the number of Sprints.

The methods of planning and sizing of work to be performed have been automated using the Salesforce platform and TDC has previously used both historical and quantitative methods to achieve the best results for clients.

Experience shows that the best methods are characterized by many of the principles inherent in the Agile process itself, which is to break work down into meaningful segments, and then focus heavily on collaboration, communication, and transparency with clients.

User Acceptance Testing (UAT) in an Agile project is generally more rigorous and timely than the classic “end of project” UAT found in other software development methodologies. The classic definition of a UAT is a process that confirms that the output of a project meets the business needs and requirements.

In waterfall projects the UAT is usually the last step in the development process. This can lead to issues since the problems found later in the process are harder to correct.

Agile projects provide a number of opportunities to interject UAT related activities throughout the process, starting with the development of user stories, to the sprint reviews and demos and, finally, the UAT sprints at the end of a release. Each UAT opportunity provides a platform for active learning and feedback from the business.

Agile User Acceptance Testing takes place in three phases:

- When user stories are define
- End of sprint demonstrations
- Sprint dedicated to final UAT prior to release

In an Agile development, since user stories are defined with representatives from the stakeholders, professional testers and development, the UAT process begins immediately. The acceptance criteria are known from the start, so this does not need to be set upon completion of the project.

At the end of each sprint, the TDC team will perform a demonstration to engage the stakeholder team in completed system functionality and to gain approval that demonstrated functionality meets the business and functional needs of the organization. The demonstrations are interactive so stakeholders can provide feedback and gain a better understanding of the actualized features.

The third level of UAT is the inclusion of a dedicated sprint to perform a final, overall UAT prior to release. In this scenario, the units of work defined for the sprint would be focused on test cases or scenarios and then fixing any discovered defects.

3. Configure/Develop Working System

Through the development / configuration process, the TDC team will hold multiple sprint reviews. As user stories are completed throughout each sprint, the development team will meet with representatives of the stakeholders to make sure that the product meets the client's standards. Each complete user story will provide a fully functional feature that stakeholders can experience firsthand. This continual validation throughout the project will reduce risk and help the project team provide a fully functional product that meets all specifications.

4. Walkthrough

As part of the TDC approach, the project team will perform a final walkthrough. The process is a critical element of the methodology since it provides the stakeholder a final opportunity to understand the proposed solution and identify any potential shortfalls. Due to the three-stage UAT process described in the previous sections, TDC does not expect many shortfalls at the end of the project. For the final walkthrough, TDC will make sure that all relevant people attend the meeting and distribute all necessary

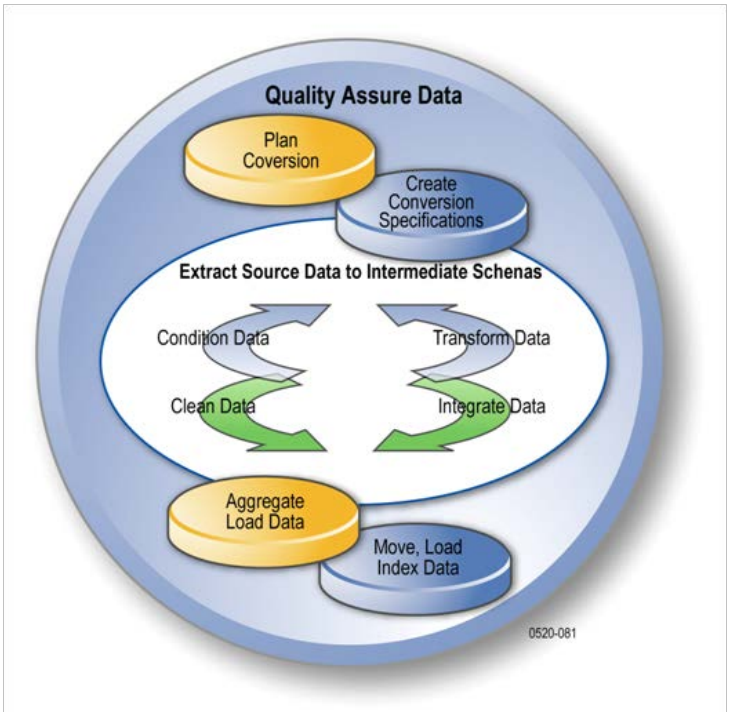
materials to all participants. The walkthrough will run through all of the user stories and fully explain all of the features and functionality provided by the solution.

E. Data Migration

The following sections explain TDC's approach to Data Migration.

1. Develop Comprehensive Data Migration Plan

The Data Conversion Plan will be built upon the TDC Data Conversion methodology. This involves various activities and tasks to support a complete and accurate data conversion to the new RMS. The data conversion methodology includes planning and management that meet and exceed Industry Standards and Best Practices and requirements as well as validation and verifications through work sessions, JADs and multiple levels and types of testing.



Data Conversion Planning and Management, including:

- Data Conversion Planning – Creating and executing the RMS Data Conversion Plan, with constant review and adjustment as the project proceeds.
- Defined approach to monitoring and applying to the data conversion changes that that occur to the RMS system data elements and usage.
- Contingency Planning – Creating the Data Conversion Contingency Plan for handling the risks and issue that arise throughout the Data Conversion project. Adjustments are made as new risks and issues emerge or are removed.

- Risk Management to track and mitigate risks to the data conversion. Follows and uses the Risk Management processes and tools of the RMS project, but tracked and managed by the Data Conversion team.
- Issue Management to track and manage the issues that arise for the data conversion Project Planning Support. Follows and uses the Issue Management processes and tools of the RMS project, but tracked and managed by the Data Conversion team.
- Agencywide Roll-Out Implementation Planning Support with the Data Conversion and Migration Planning.
- Continual monitoring and updates Implementation Planning based on Conversion Engine performance during testing to be applied to the Implementation Planning

2. Define Test Cases for Validating Converted Data

The TDC approach to data testing defines test cases as a set of conditions or variables under which the testing team will determine whether the data under test satisfies requirements and works correctly. TDC will develop custom test cases specific to the project for the following testing scenarios:

- Structure Validation
- Validating Data Mapping Document
- Validate Constraints
- Data Consistency Check
- Data Completeness Validation
- Data Correctness Validation
- Data Transform Validation
- Data Quality Validation
- Null Validation
- Duplicate Validation
- Date Validation Check
- Full Data Validation Minus Query
- Data Cleaning

3. Migrate Data to Test Environment

Once data is transferred to the test environment, the TDC team will perform data testing to ensure the accuracy of data that has been transformed from the legacy system to the newly developed system. In the testing environment, that data can be verified before the system in launched.

To achieve verification, TDC will employ a variety of different tests. The following are the core data test that TDC employs as part of its data migration methodology:

- **Product Validation Testing** also known as table balancing is performed on data that is being moved into a new environment. The testing ensures that the data are not compromised in the new system and in the correct order for business processes.

- **Application Upgrade Testing** checks to make sure that the data in the new system match the same data in the legacy system.

- **Metadata Testing** tests and compares multiple types of metadata including data type, data length and index / constraint.

- **Data Completeness Testing** can verify that no data is missing. This type of testing includes compare and validates counts.

- **Data Accuracy Testing** ensures that the loaded and transformed data retained accuracy throughout the process.

- **Data Quality Testing** is mostly composed of syntax and reference tests. This process ensures that there is no error in date or order number in the business process. Syntax tests will identify unclean data, while reference tests will check the data based on the existing data model.

4. Migrate Data to Production Environment

The TDC approach to data migration calls for data to be moved to the final product environment only after the completion of development, user acceptance testing, and data testing have been complete. The final data migration will be performed as one of the final steps before cutover. This allows for a complete transfer as nothing is left in the original system due to a gap between final migration and go-live.

F. User Acceptance Testing

The following sections provide detail on TDC's approach to UAT.

1. Provide Test Environment and Fully Functioning System

The TDC Salesforce solution offers not only a production environment, but also multiple sandbox environments including one for testing. This virtual system allows for development, testing and training without compromising the data and applications in the production organization. A sandbox allows for performance testing, load testing and staging. The environment is full replica of the production system and can include sample testing data. This type of system will be used for UAT as well as testing the data migration.

2. Provide Training of TA UAT Team

At the conclusion of each sprint, TDC will provide a sprint demonstration and review to stakeholders from the TA. This will give stakeholders the opportunity to see the system's features and functions in action and provide feedback. Once all of the sprints for each phase are complete, TDC will provide another high-level review and train the UAT team on all of the features that make up that phase. This will give the UAT team a full understanding of the system and properly prepare them for UAT.

3. Review TA's UAT Plan and Cases

As an essential element of UAT, TDC will allow the UAT team to come up with their own test plan and test cases. Prior to the start of UAT, the project team will review those plans and cases to make sure

that the UAT team has a proper understanding of the new system. The UAT team will also have access to the existing user stories that TDC developed as part of configuration. These will provide guidelines to the UAT team as they decide how to experience the new system first hand.

G. Documentation

The following sections set forth TDC's approach to documentation.

1. Develop User Manual for System Users

As part of the implementation, TDC will develop a user manual for any and all system users. The manual will be tailored directly to the TA's terminology and business processes. As part of the process, TDC will meet with and interview a variety of stakeholders in order to establish the business process and develop user stories. The information gathered during these interviews will also be vital in establishing the knowledge base needed for the user manual. Also information associated with the business process will be matched with the details of the new RMS, which will provide a usable guide from TA employees and any other end users.

2. Provide Online Help Functionality and Content

As part of the Salesforce solution, TA end users will have access to training and support of the Salesforce product. The list of online help functionality and content includes the following:

- Unlimited access to the entire online course catalog
- 24x7 toll-free phone support
- Priority case queuing and routing
- Quick initial 1-hour response time for critical issues
- An assigned support account rep
- Force.com code troubleshooting
- Customizable end-user course templates
- Premier Success Review to measure usage and trends
- Access to the pool of Salesforce Certified Administrators who can configure and maintain the Salesforce edition
- More than 100 administrative services

In addition, TDC will also provide an only repository of reference material as it pertains to any custom development or configuration.

3. Develop System Administration / Operations Guide

In addition to a manual for end users, TDC will also provide a system administration / operations guide. Per the requirement of the RFP, this will include, but will not be limited to, the following:

- Maintenance of user accounts and roles
- Configuring system parameters and business rules
- Security features
- Running of jobs

- Backup and recovery
- Building and running reports
- Setup of letter templates

In addition to this guide, the Salesforce online and phone support can also provide details and assistance on these types of topics.

H. Training

The following sections details TDC's training methodology.

1. Develop Training Plan / Materials

Consistent with the requirements of the RFP, a comprehensive training program to support the development and implementation of the design and deployment of a new records management system will be delivered. It is recognized that knowledgeable, trained end users are most critical to the success of Taxicab Authority. The project team will ensure that the product training is integral to every stage of the development and implementation of the new RMS. The training team will be comprised of the Training Manager, Learning Management Consultants, and Trainers. Learning Management Consultants are engaged at every stage of the training process to develop and deliver outcome focused training. Learning Management Consultants will provide an enterprise results oriented approach to the three (3) key areas of lifecycle training:

- Course Development / Construction – what is the content of each training module
- Element Creation / Module Development – what are the materials and tools to be used for each training module and each user group
- Delivery – what is the delivery mechanism for each module and each user group

The result is training content development and training delivery that is both high quality and engaging for each user group.

A series of instructional materials will be used to facilitate the delivery of each training module within the training curricula and will include:

Course Outlines—Similar to a table of contents, the course outline defines the content elements of a particular course and the order in which the content is to be presented. It includes the following items:

- Course purpose and objectives
- Key topics based upon task activity (content outline)
- Task objectives
- Assessment methods (review questions, exercises)
- Delivery method (formal classroom, self-paced, online, Web-based)
- Presentation time requirements
- Target audience

Learning Guide—The primary tool for instructor-led classroom training is the learning guide. This document specifies what must be learned and includes information and activities such as hands-on exercises and lesson reviews.

Instructor's Guide—In addition to the training material, there are a series of instructor slides, created in PowerPoint, for each training course. These slides are designed to help the instructor:

- Introduce a new learning unit
- Reinforce or supplement a lecture or demonstration
- Present new concepts, terms, and processes
- Pace the training presentation

Exercise Guide—The trainer will demonstrate the activity to the course participants and then each participant will be given an opportunity to get hands-on exposure to the activity through exercises. Exercises are typically designed to:

- Demonstrate the end user's understanding of the training
- Enable learners to practice activities in a safe environment
- Maintain the attention of the learners
- Check the progress of the end users
- To assess the pace of the course and whether additional time is needed to train

Quick Reference Cards—The quick reference card is a separate handout. It is intended to remind end users of key features, options, and methods of working in the new system. The quick reference card is a job aid. Its primary function is to assist the new user back on the job and to promote self-sufficiency after training.

Training Data Sheets—The training data sheet is a separate handout. It outlines the data requirements for the particular course, including:

- General information about the training system
- Training IDs and passwords for each learner
- Master and activity data for instructor demonstrations, practice exercise, and the evaluation procedure

Self-Guided Instructional Content—Supplemental materials will be created for the training participants to access learning information outside of the classroom setting in the form of computer based instructional CDs and Web-based content.

Online Forum—A moderated, online forum shall be provided to allow users to submit questions concerning the new system. This interactivity will result in a Frequently Asked Questions and later as a Knowledge Base for product usage.

Master copies of all training materials, including those described above, shall be provided to the Taxicab Authority stakeholders in electronic format as they are originated and updated for the duration of the contract. The stakeholders shall also have copy and distribution rights to all training materials created during the project.

2. Provide a Fully Functional Training Environment with Data

The TDC Salesforce solution offers not only a production environment, but also multiple sandbox environments including one for testing. This virtual system allows for development, testing and training without compromising the data and applications in the production organization. A sandbox allows for performance testing, load testing and staging. The environment is full replica of the production system and can include sample testing data. This type of system will be used for end user training.

3. Conduct User Training

The project team will also create a comprehensive spectrum of targeted and role-based training content, deliver training to end users quickly and efficiently until the rollout is completed, and verify the proficiency of trained personnel to accurately and effectively perform related tasks. The goal is to ensure that users fully understand the software, are able to gain the full benefit of its functionality, and have the ability to perform their jobs more effectively through competency in using the RMS system to support their processes and objectives. TDC's training deliverables will introduce and describe key system processes as well as system capabilities.

The following are the key tenets of the approach to product training and training delivery that guide the TDC approach in terms of learning objectives and principles:

Design and Execute High-Quality Training— Identified end users will require education on navigating in the new environment and require an understanding of the products and tools used in developing the solution. Training will include key business processes embedded within the RMS, as well as supporting solutions such as report writing and system configuration tools. Users will need to be trained in how to locate information and execute any activities associated with their RMS role. Upon completion of training, they will be expected to apply their learning to their specific responsibilities.

Transfer Knowledge from Project Team to the End Users— With the assistance of functional subject matter experts and the systems design team, the TDC team will develop training materials and training delivery guides that will support better knowledge transfer to the end user community. The team will leverage online tools that will allow users to train at their own pace, repeat training courses as needed over time, and access additional advanced product information and details about the applications and tools.

Training staff will prepare training scripts and review the training materials at specific points in the project to ensure the accuracy, quality and completeness of the training materials. In this way, trainers will be armed with the experience and insights of those working on system implementation and were involved in the design decisions that impacted business processes and information flows.

Create a Sustainable Training Program—Training tools and processes will be put in place to ensure that training is an ongoing experience instead of a one-time event. In addition to instructor led classroom training, computer based instructional CDs and Web-based content will be provided as a medium for self-guided material review and reinforcement. The TDC team will also provide a moderated online forum for users to submit questions concerning the new system. This forum will result in the generation of Frequently Asked Questions documentation, which will eventually develop into a knowledge base for use of the RMS system. Additionally, the training staff will develop a train-the-trainer program to provide post-implementation support and help create a sustained learning environment.

Training Critical Success Factors

There are several critical success factors based on best practices for training design, development, and delivery:

Management Commitment and Involvement—Providing resources to develop and deliver training, demonstrating support for the project and ensuring that users have sufficient time and support to complete training and attend classes is critical to the success of the project. The RMS, once implemented, will result in changes to how personnel perform their specific job roles. A successful training program will help to eliminate many of the risks that accompany such changes.

A Comprehensive Training Program that Focuses on the End Users—A comprehensive training program is more than teaching users how to navigate screens and enter data. It is teaching people how to use the new system to become more effective and efficient in their day-to-day work. Through the course of normal instruction, participants will see how the system can positively impact their role in the organization.

A Managed Learning Pace to Prevent Information "Overload" of Employees—Courses will be designed to train the learner at an optimal pace and reinforce learning objectives with hands-on activities and appropriate exercises. Multiple learning modalities will be employed to meet the audio, visual, and kinesthetic learning needs of the training participants. Training sessions will be structured to not only show demonstrations of the RMS system, but training participants will interact with simulations and the full system interface.

Early Identification of the Trainers—Learning management consultants and trainers will be involved in the project early on to ensure that there is sufficient time for knowledge transfer and to prepare to deliver training. This is the best way for them to learn the system, which helps the training team develop a comfort level with the system before the start of training and rollout. They should also participate in the creation of training exercises and the setup of the data in the training environment, ensuring that these components reflect the specific requirements of the new processes. By involving the training personnel in key components of the project provide them with detailed information on how the system is designed and how to manage exception events. This will be extremely helpful to the exchange in the end user classroom training and in supporting the users post rollout.

Process Documentation Support and Accuracy—The development of accurate training material is dependent on clearly defined processes and documentation. Early in the project, the project teams must work together to rollout the documentation process (templates, level of detail, standards) and identify the timeline and integration points between the teams. By doing this jointly, the teams buy into the process, understand why documentation is important and know what their roles are. This eliminates the potential for duplicate documentation/work effort and ensures complete and accurate documentation and training material.

A Commitment from Team Members to Regular Quality Reviews—Not only will the system need to be thoroughly tested, but the team will include in test plans a close examination of the end user documentation and training material to ensure that they accurately reflect up-to-date processes and configuration. Training end users on inaccurate or outdated information may result if the materials are not thoroughly and continuously reviewed and tested.

Timely Updates to Training Prior to Rollout—The training system and materials must mirror the production environment to ensure that end users can be trained on the processes and transactions that they will perform in their roles. The training tools and solutions based on Oracle's User Productivity Kit (UPK), will allow for a centralized repository of training materials and an easy to use toolset to keep training scripts and user guides current on a timely basis.

Ownership of the Training Program—Training is a major concern both before and after go-live. It is the project team's goal to provide the support and transfer knowledge to the extended training team (developers and trainers), so that the new process can effectively manage future training. Involving staff in all aspects of the training program will help to ensure maximum user awareness, acceptance, and ownership of the new system.

Product Training Program

The training team will design a training program and curricula that appropriately address the training needs of the key audiences. Separate training curricula will be developed for each end user role. The curricula will cover all designated users authorized to access, view, and use the system and its supporting components. The training curricula will each consist of one or more training modules specifically correlated to the functional modules of the system and the corresponding job function. It will also include implementation training to be delivered prior to each scheduled rollout of the new RMS system.

The training components focus on best practices as reflected in the system through a combination of presentation and hands-on practice during the course of instruction. The training team is responsible for the coordination of the delivery of product training.

Audience Profile

All designated users will be grouped by a profile that will designate the timing of the delivery of training to those users. Each audience will require an individualized curriculum that supports the business

processes in which they work and the associated RMS activities. A detailed audience analysis will identify the appropriate curriculum for each employee based on his or her roles and activities.

Training Element Creation

Learning Management Consultants have been identified who will be responsible to produce the training content. They will develop the instructional materials required to deliver the training program and participate in the quality review process. The training personnel will provide:

- Review of the training development process
- Understanding of the training timelines
- Knowledge of the quality review process
- Standardization
- Consistent mapping of training materials to trainers' instruction

All training material development will be prioritized based on the delivery schedule of the product training program. Training plans and training materials will be provided to stakeholders for review, feedback, comment, and approval as set forth in the project plan. As courseware is updated to reflect the latest version of the system, the updated version of training materials will be provided to the stakeholders within fifteen calendar days of receipt of the identified changes or sooner if there is a scheduled training session that shall be impacted.

The design of each training module will begin with storyboarding and comprehensively outlining the training module's audience, objectives, timelines, and methodologies of delivery, assessment, evaluation, and control. The training developers will be using the UPK as the development tool for both the documentation and training requirements of the system. UPK will be used to record and generate training materials for each training module and each method of training delivery—quick reference guides, conventional classroom training material, instructional CDs, and Web-based training material—that is consistent between product documentation and user training, between methods of training delivery, as well as with trainer lectures and demonstrations. UPK will also be used to generate and process trainee proficiency tests and course evaluations.

I. Transition to Production

Once all testing has been complete and all training has been certified. The TDC team will move to cutover the system into a go-live environment. Due to the project team's earlier commitment to knowledge transfer the cutover should be simple and the system should be ready from the start.

The knowledge transfer plan starts with TDC defining all necessary tasks and responsibilities. Then, each responsibility will be tied to an existing position, role, or employee. At this point, TDC will make sure that the existing employee has the requisite knowledge to perform the task. Finally, TDC will review and validate the knowledge transfers to ensure that the process can continue seamlessly. Following the transition, TDC will remain involved in the process from a support perspective on an as-needed basis.

The TDC support model is designed to provide the greatest amount of flexibility to our clients for newly deployed systems. The TDC proposal describes the broad array of support provided by the Salesforce platform. Additionally, TDC provides support to newly implemented systems that includes break fix, as well as changes and enhancements, to support operational developments post deployment.

The TDC model provides an ability for customers to draw down on a designated number of hours of support on an as-needed basis. The TDC support is designed to add value to all aspects of the agency during the critical and fluid adoption period of the organization. The matrix below identifies the framework of support provided by TDC, and following are the hours associated with the draw down support model per year. During the planning stages of the project, the TDC PM will seek to refine and fine tune the support model to ensure that TDC is able to meet the specific needs of the TA.

Contract Period	Total Hours
Year 1	475
Year 2	715
Year 3	715

The following table shows the total roles and responsibility associated with the TDC support model.

Primary Column	Case Type	Category	TA	TDC	3rd Party Vendor
New User	Configuration	Access		✓	
Edit User	Configuration	Access		✓	
Deactivate User	Configuration	Access		✓	
Reset Password	Configuration	Access		✓	
New License for 3rd Party tool	External Vendor	Access	✓		✓
New Portal User	Configuration	Access		✓	
New Portal - Reset Password	Configuration	Access		✓	
Case	Configuration	Feature Request			
Bulk Delete	Configuration	Problem		✓	
Transfer Ownership	Configuration	Record Maintenance		✓	
Mass Transfer	Configuration	Record Maintenance		✓	
Bulk Data Load	Configuration	Record Maintenance		✓	
Error Message	Configuration	Problem	✓	✓	
Data Error	Configuration	Problem	✓	✓	
General Inquiry		Question	✓	✓	
New Report	Configuration	Feature Request		✓	
Report Error	Configuration	Problem		✓	
New Dashboard	Configuration	Feature Request		✓	
Dashboard Error	Configuration	Problem		✓	
New Field	Configuration	Feature Request		✓	
New Field Value - Dropdown List	Configuration	Feature Request		✓	
New Queue	Configuration	Access		✓	
New Permission	Configuration	Access		✓	

Set					
Global Page Layout Change	Configuration	Record Maintenance		✓	
Portal / Site Page Layout	Customization	Feature Request		✓	
New Site / Portal	Customization	Feature Request	✓	✓	
Integration	Customization	Feature Request	✓	✓	
Payment Processor App Issue	External Vendor	Problem		✓	✓
Document Creation	External Vendor				✓
Electronic Signature Error	External Vendor				✓
Mobile Device Error	External Vendor	Problem	✓		
Quarterly System Update	Configuration	Record Maintenance			
Workflow Rule	Configuration	Feature Request		✓	
Business Rule	Configuration	Feature Request		✓	
Create New Button	Customization	Feature Request		✓	

J. Post Implementation Review

Upon the completion of production and transition, TDC will perform post-implementation review. The following section details that plan.

1. Post Implementation Review Plan

Following the implementation, TDC will work with the TA to develop a Post Implementation Review Plan (PIRP). The TDC post implementation review plan seeks to answer these main questions:

- Did the implementation solve the problems of the client?
- Are there ways to maximize the benefits of the new system?
- What lessons did TDC or the TA learn that can be applied to future projects?

To answer these questions, the TDC will perform that following tasks:

Gap Analysis
TDC will review the original project plan to compare how closely the results match with the original objectives. If there are gaps, TDC will discuss strategies to fill the gaps with the TA.

Stakeholder Satisfaction
A major element of the PIRP is determining the TA's level of satisfaction with the implementation. If key stakeholders are not satisfied, then mitigation strategies can be discussed as part of this task.

Project Cost / Benefit
TDC will review the final cost of the project. The project team will also preview the stakeholders with details about how much it will cost to continue to operate the solution and receive maximum benefit.

Further Development

The project team will provide any suggestions about future developments that could enhance the effectiveness of the new system and provide additional benefit to the end users.

Findings / Recommendations
This task allows TDC and the stakeholders an opportunity to provide details on anything that was learned during the course of the project. Both parties will be allowed to give critiques at this stage of the post implementation process.

2. Resolution of System and Vendor Operational Issues

The TDC team will have a final meeting with the stakeholders to resolve any outstanding issues left following the implementation. TDC plans to address all issues via the support model outlined in Section I. Transition to Production.

VIII. Company Background and References

A. Vendor Information

The following is the vendor information for TDC.

1. Company Profile

Question	Response
Company name:	Telecommunications Development Corp.
Ownership (sole proprietor, partnership, etc.):	Corporation
State of incorporation:	Washington, DC
Date of incorporation:	1/15/1997
# of years in business:	20 years
List of top officers:	James Woodyard, President/CEO Roger Richmond, Vice President/Principal
Location of company headquarters:	1919 13th Street, NW Washington, DC 20009
Location of the company offices:	1919 13th Street, NW Washington, DC 20009
Location of the office that will provide the services described in this RFP:	1919 13th Street, NW Washington, DC 20009
Number of employees locally with the expertise to support the requirements identified in this RFP:	20
Location from which employees will be assigned for this project:	Nevada, Washington, DC and Arizona

2. Nevada Business License

Question	Response
Nevada Business License Number:	In Progress
Legal Entity Name:	Telecommunications Development Corp.

Is "Legal Entity Name" the same name as vendor is doing business as?

Yes	X	No	

3. State Engagement History

Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes		No	X

4. State Employment History

Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	X

5. Disclosure of Contract Failure, Breaches or Litigation

Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP must also be disclosed.

Does any of the above apply to your company?

Yes		No	X

6. Insurance Requirements

Vendors must review the insurance requirements specified in Attachment E, Insurance Schedule for RFP 3422. Does your organization currently have or will your organization be able to provide the insurance requirements as specified in Attachment E.

Yes	X	No	

7. Company Qualifications

TDC is headquartered in the District of Columbia, with offices in New Orleans, LA, Charlotte, NC, and Cincinnati, OH, and was established in 1995. TDC has over fifteen (15) years of experience in the implementation of enterprise-wide technology and data management solutions. TDC's reputation and experience has been built on providing high quality personnel to manage and support the implementation of complex highly available solutions.

TDC recently completed the implementation of Salesforce in support of the District of Columbia Department of For Hire Vehicles (DFHV), and has additionally been engaged by the DFHV to implement SharePoint across various functions of the agency and to develop and implement a Risk-Based Audit and Compliance Program. The Risk Based Audit and Compliance Program is designed to ensure compliance with applicable laws, regulations, policies and practices as well as to safeguard against programmatic fraud, waste, abuse and mismanagement within the agency. The program is intended to promote transparency and consistency in the agency's processes and operational activities.

TDC has a broad range of experience in implementing records management systems, both as described for the DFHV, and as well in support of public safety agencies. The following are examples of projects TDC that has led in recent years in support of Public Safety Agencies.

- Government of the District of Columbia – Next Generation 911 Project
- Maryland Aviation Authority- Computer Aided Dispatch and Records Management Project
- Amtrak – Computer Aided Dispatch and Records Management Project

TDC has also led the implementation of Customer Relationship Management (CRM) platforms in support of as many as sixty (60) government agencies for municipal organizations. The following are examples of CRM projects that TDC has led or supported in recent years.

- City of Charlotte – CRM Implementation
- City of New Orleans – 3-1-1 / CRM Implementation
- Government of the District of Columbia – CRM Implementation

TDC experience includes Case Management Systems in support of criminal justice and administrative hearing environments such as the following:

- City of New Orleans – Criminal Justice Information System
- Government of the District of Columbia, Office of the State Superintendent of Education – Student Hearing Office Docketing / Case Management System

TDC has managed the implementation of (and developed) case management and data management system in Education environments such as the following:

- Government of the District of Columbia, Office of the State Superintendent of Education – Special Education Data System
- Government of the District of Columbia, Office of the State Superintendent of Education – Non-Public Data Management System
- Government of the District of Columbia, Office of the State Superintendent of Education – Special Education Reporting Framework

TDC experience includes the implementation of case management and data management systems in laboratory and corrections environments such as the following:

- Washington Suburban Sanitary Commission – Laboratory Information Management System
- Government of the District of Columbia, Consolidated Forensics Laboratory – Laboratory Information Management System
- Government of the District of Columbia, Department of Corrections – Offender Management System.

In each of these engagements outlined in the preceding paragraphs, TDC has successfully executed a "marriage" of project management expertise with subject matter expertise to ensure that our team of

key personnel has an in-depth understanding of the project and stakeholder environment, as well as a keen understanding of structured and systematic project delivery.

TDC prides itself on providing a structured PMO function of project small and large. The TDC team adapts it project methodology to the unique environment of our customer and adds value to each customer as a function of the broad range of experience of our project team and the resources of the company as a whole.

TDCs PMO experience has proven successful in projects large and small. TDC established and led the National Capitol Region Homeland Security Grants Program responsible for over 200 projects across three (3) states totaling over $200M, and TDC established and led the PMO for the District of Columbia Unified Communications Center consisting of the implementation of seven (7) enterprise wide systems with a total project value of over $118M.

The TDC team looks forward to establishing a value added partnership with the State of Nevada and the Taxicab Authority by bringing a complement of experience in enterprise wide system implementation, Salesforce, and For Hire Vehicle organizations.

8. Company Experience

TDC was established in 1995 and has been actively engaged in the implementation of enterprise wide technology solutions since 1999. TDCs first projects in this arena were in support of 9-1-1 and public safety organizations. These high availability solutions were used to track and manage all data associated with public safety calls for service, the dispatch of these calls for service to first responders, and the response and close out of these events by first responders. In addition, these solutions used GIS and other data systems to identify the appropriate and closest units for response, and end-to-end data had to be made available to track and report performance metrics and to feed third party stakeholders such as court systems and attorneys.

TDCs public safety technology and data management experience led to structured PMO type engagements, as well as case management solutions. Our case management and PMO experience led us into data management (and custom application development) and eventually led us to transportation environments and to Salesforce and the For Hire Vehicle industry.

TDC is excited at the opportunity to bring a team of key personnel to the State of Nevada with direct and recent experience in the requirement set forth by the State, and to additionally afford the State with the benefit of the lessons learned from TDCs eighteen (18) years of system implementation experience.

9. Financial Information and Documentation

Financial information has been included as a Confidential Financial document.

B. Subcontractor Information

The following sections detail TDC's approach to subcontracting and also provides details on project partner PracticeVantage.

1. Use of Subcontractors

For the purpose of this project, TDC is teaming with PracticeVantage. TDC and Practice Vantage have a proven record of success having recently completed two (2) phases of implementation of Salesforce with the District of Columbia Department of For Hire Vehicles as the system of record for the management of all data associated with driver licensing and renewal, taxi and limousine registration and renewal, and all complaint and agency inquiry case management.

2. Methodology, Process and Tool for Selecting / Using Subcontractors

As previously stated, TDC already has an existing relationship with PracticeVantage. The following process is TDC's methodology for partnering with new subcontractors. When initially selecting contractors TDC employs a six (6) pronged approach consisting of:

- **Experience:** TDC will make sure that the subcontractor has the right experience including volume of work. Reviewing experience also allows to TDC to properly match a subcontractor's capabilities with the project specific requirements
- **Accountability:** It is important to understand a subcontractor's supervisory structure. Before entering into a partnership, TDC will determine who runs the business and who manages the day-to-day operations of the company.
- **Business Management:** TDC will examine financial statements and ensure that the subcontractor meets all insurance and bonding requirements for the project.
- **Litigation:** As part of the subcontractor methodology, TDC will check whether the subcontractor has a history of litigation, claims or conflict resolution.
- **Processes:** TDC will meet with potential subcontractors to examine how the company handles labor time capture, reporting and a variety of other processes.
- **Reputation:** TDC engages third-party firms to investigate the reputation of all potential partners before entering into a business agreement.

3. Subcontractor Vendor Information

Question	**Response**
Company name:	PracticeVantage
Ownership (sole proprietor, partnership, etc.):	LLC
State of incorporation:	AZ
Date of incorporation:	10/27/2014
# of years in business:	2.5 years
List of top officers:	Murali Rajendran

Question	Response
Location of company headquarters:	913 E Boston St, Gilbert, AZ 85295
Location(s) of the company offices:	913 E Boston St, Gilbert, AZ 85295
Location(s) of the office that will provide the services described in this RFP:	913 E Boston St, Gilbert, AZ 85295
Number of employees locally with the expertise to support the requirements identified in this RFP:	8
Number of employees nationally with the expertise to support the requirements in this RFP:	10
Location(s) from which employees will be assigned for this project:	Arizona, continental US, offshore (India)

4. Subcontractor Vendor References

1. Health Alliance Medical Plans

Reference #:	**1**		
Company Name:	**Health Alliance Medical Plans**		
PracticeVantage	**Vendor**		**Subcontractor**
Project Name	Salesforce CRM and Platform rollout		
Primary Contact information			
Name:	Jana Perry		
Street Address:	301 S Vine St		
City, State, Zip:	Urbana, IL 61801		
Phone, including area code	217-255-4544		
Facsimile, including area code			
Email address:	Jana.perry@healthalliance.org		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code			
Facsimile, including area code			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	HealthAlliance implemented Salesforce in 2012. We continue to enhance functionality by implementing new and improving on existing business processes on the Salesforce platform. The project includes custom development and integration with external partners. We currently have over 320 active users across more than 60 end to end workflows.		
Original Project/Contract Start Date:	6/2015		

Original Project/Contract End Date:	Ongoing
Original Project/Contract Value:	$300,000 per year contract.
Final Project/Contract Date:	- Ongoing
Was project/contract completed in a time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	Yes

2. ABSYZ Inc

Reference #:	**2**		
Company Name:	**ABSYZ Inc**		
PracticeVantage	**Vendor**		**Subcontractor**
Project Name	Healthcare project on Salesforce		
Primary Contact information			
Name:	Anshul Jain		
Street Address:	180 Steuart St #192750		
City, State, Zip:	San Francisco, CA 94119		
Phone, including area code	650.822.7998		
Facsimile, including area code			
Email address:	Anshul.jain@absyz.com		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code			
Facsimile, including area code			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	Practice Vantage was instrumental for implementing Salesforce for one of our elite clients in Health Care Industry. They brought in a lot of expertise and value covering the Consulting, Solution Design and Implementation aspects.		
Original Project/Contract Start Date:	1/2016		
Original Project/Contract End Date:	Ongoing		
Original Project/Contract Value:	$250,000 per annum contract		
Final Project/Contract Date:	Ongoing		
Was project/contract completed in a time originally allotted, and if not, why not?	Yes		
Was project/contract completed	Yes		

within or under the original budget/cost proposal, and if not, why not?	

3. MKEdu

Reference #:	**3**		
Company Name:	**MKEdu**		
PracticeVantage	**Vendor**		**Subcontractor**
Project Name	Salesforce custom development.		
Primary Contact information			
Name:	Mayur Shah		
Street Address:	920 Curtiss Street, #338		
City, State, Zip:	Downers Grove, IL 60515		
Phone, including area code	630-929-8601		
Facsimile, including area code			
Email address:	mshah@mkedu.org		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code			
Facsimile, including area code			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	MKEdu is rolling out various back office functionality on the Salesforce platform. The project includes custom development and configuration.		
Original Project/Contract Start Date:	6/2015		
Original Project/Contract End Date:	Till date		
Original Project/Contract Value:	$50,000 /yr		
Final Project/Contract Date:	Project is continuing on O&M plus new development.		
Was project/contract completed in a time originally allotted, and if not, why not?	Yes		
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	Yes		

4. SharSolutions LLC

Reference #:	**4**		
Company Name:	**Shar Solutions LLC**		
PracticeVantage	**Vendor**		**Subcontractor**

Project Name	Salesforce Clinical Portal
Primary Contact information	
Name:	Suriya Soundrapandian
Street Address:	74 N Harmon Dr
City, State, Zip:	Chandler, AZ 85226
Phone, including area code	(480) 252-4078
Facsimile, including area code	
Email address:	suriya@sharsolutions.com
Alternate Contact Information	
Name:	
Street Address:	
City, State, Zip:	
Phone, including area code	
Facsimile, including area code	
Email address:	
Project Information	
Brief description of the project/contract and description of services performed:	Livongo is managing the health cloud for diabetic members who were monitored by Internal Livongo CDE (clinical diabetics experts) or by the Care org/Payor external CDE. Using Salesforce, we expose the member data access to External and Internal CDE in a restrictive manner based on business policies.
Original Project/Contract Start Date:	7/2016
Original Project/Contract End Date:	Till date
Original Project/Contract Value:	$125,000 annual
Final Project/Contract Date:	Ongoing
Was project/contract completed in a time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	Yes

5. Cloudalyze

Reference #:	**5**		
Company Name:	**Cloudalyze**		
PracticeVantage	**Vendor**		**Subcontractor**
Project Name	Salesforce Clinical Portal		
Primary Contact information			
Name:	Vaibhav Mankame		
Street Address:	3725 Eastwood Cir,		
City, State, Zip:	Santa Clara, CA 95054		
Phone, including area code	408-368-6314		

Facsimile, including area code	
Email address:	vaibhav.mankame@cloudalyze.com
Alternate Contact Information	
Name:	
Street Address:	
City, State, Zip:	
Phone, including area code	
Facsimile, including area code	
Email address:	
Project Information	
Brief description of the project/contract and description of services performed:	Developing custom solutions on the Salesforce platform.
Original Project/Contract Start Date:	06/2016
Original Project/Contract End Date:	Till date
Original Project/Contract Value:	$100,000 annual
Final Project/Contract Date:	Ongoing
Was project/contract completed in a time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	Yes

5. Subcontractor Vendor Staff Resumes

Resumes for PracticeVantage have been included in section IX. Proposed Staff Resumes.

C. Business References

The following are five business references for TDC.

1. District of Columbia – Department of For Hire Vehicles

Reference #:	**1**		
Company Name:	**Telecommunications Development Corp**		
X	**Vendor**		**Subcontractor**
Project Name	Salesforce Implementation		
Primary Contact information			
Name:	Ernest Chrappah, Director		
Street Address:	2235 Shannon Place, SE		
City, State, Zip:	Washington, DC 20020		
Phone, including area code	202-645-6005		
Facsimile, including area code	202-889-3604		
Email address:	Ernest.Chrappah@dc.gov		

Alternate Contact Information	
Name:	Pedro Agosto
Street Address:	2235 Shannon Place, SE
City, State, Zip:	Washington, DC 20020
Phone, including area code	202-645-0118
Facsimile, including area code	202-889-3604
Email address:	Pedro.Agosto@dc.gov
Project Information	
Brief description of the project/contract and description of services performed:	TDC recently completed the implementation of Salesforce in support of all driver licensing and renewal, and all vehicle registration and renewal. The project additionally consists of the implementation of a portal for drivers and companies, and the implementation of case management functionality to manage and track complaints and agency inquiries.
Original Project/Contract Start Date:	2015
Original Project/Contract End Date:	2017
Original Project/Contract Value:	$800,000
Final Project/Contract Date:	2017
Was project/contract completed in a time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	Yes

2. District of Columbia – Department of Employment Services

Reference #:	**2**		
Company Name:	**Telecommunications Development Corp**		
	Vendor	**X**	**Subcontractor**
Project Name	Implementation of Records Transfer System		
Primary Contact information			
Name:	Roberta Collins, Associate Director		
Street Address:	4058 Minnesota Avenue, NE		
City, State, Zip:	Washington, DC 20019		
Phone, including area code	202-698-6681		
Facsimile, including area code	202-673-6993		
Email address:	Roberta.Collins2@dc.gov		
Alternate Contact Information			
Name:	Darryl Wiggins		
Street Address:	510 Florida Ave, NW		
City, State, Zip:	Washington, DC 20001		

Phone, including area code	202-299-1011
Facsimile, including area code	202-299-1014
Email address:	Dmwiggins@documentmanagers.us
Project Information	
Brief description of the project/contract and description of services performed:	TDC is currently managing the Accessioning project which includes the implementation of FileNet for the management and tracking of 3M records.
Original Project/Contract Start Date:	2015
Original Project/Contract End Date:	Project in progress
Original Project/Contract Value:	$500,000
Final Project/Contract Date:	Project in progress
Was project/contract completed in a time originally allotted, and if not, why not?	N/A
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	N/A

3. City of New Orleans – Office of Innovation and Technology

Reference #:	**3**		
Company Name:	**Telecommunications Development Corp**		
X	**Vendor**		**Subcontractor**
Project Name	3-1-1, CRM, and Case Management Solutions Implementation		
Primary Contact information			
Name:	Edward Kerkow, Acting Chief Information Officer (former)		
Street Address:	1300 Perdido Street, Suite 3E05		
City, State, Zip:	New Orleans, LA 70112		
Phone, including area code	504-444-5570		
Facsimile, including area code	N/A		
Email address:	Edward.Kerkow@sungardps.com		
Alternate Contact Information			
Name:	Harrison Boyd, Chief Information Officer (former)		
Street Address:	1315 Irving Street, NW		
City, State, Zip:	Washington, DC 20010		
Phone, including area code	202-380-9950		
Facsimile, including area code	202-587-9005		
Email address:	Harrison.Boyd@adc-ms.com		
Project Information			
Brief description of the project/contract and description of services performed:	TDC managed the implementation of the Lagan CRM platform in support of the NOLA 3-1-1 system for the management of constituent requests for service for all public facing agencies of the		

	city.
Original Project/Contract Start Date:	3/2012
Original Project/Contract End Date:	3/2013
Original Project/Contract Value:	$1.5M
Final Project/Contract Date:	3/2013
Was project/contract completed in a time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	Yes

4. District of Columbia – Office of the State Superintendent of Education

Reference #:	**4**		
Company Name:	**Telecommunications Development Corp**		
X	**Vendor**		**Subcontractor**
Project Name	Special Education Data System Implementation		
Primary Contact information			
Name:	William Henderson, Project Director, Data Accountability and Research		
Street Address:	810 First Street, NE, Ninth Floor		
City, State, Zip:	Washington, DC 20002		
Phone, including area code	202-285-2427		
Facsimile, including area code	N/A		
Email address:	William.Henderson@dc.gov		
Alternate Contact Information			
Name:	Amy Maisterra, Assistant State Superintendent		
Street Address:	810 First Street, NE, Ninth Floor		
City, State, Zip:	Washington, DC 20002		
Phone, including area code	202-741-6412		
Facsimile, including area code	202-741-0227		
Email address:	Amy.Maisterra@dc.gov		
Project Information			
Brief description of the project/contract and description of services performed:	The TDC team implemented and currently manages the Special Education Data System which is a longitudinal database that tracks and manages all student level data from Special Education referral through exit.		
Original Project/Contract Start Date:	2009		
Original Project/Contract End Date:	Project in Progress		

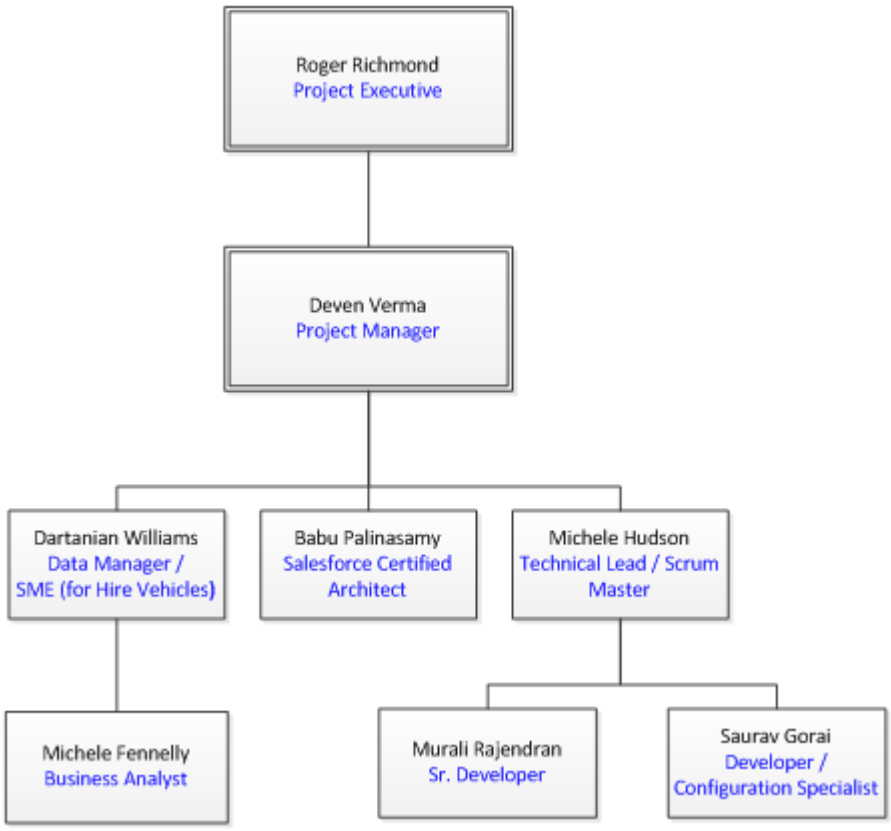
Original Project/Contract Value:	$2.5M
Final Project/Contract Date:	Project in Progress
Was project/contract completed in a time originally allotted, and if not, why not?	N/A
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	N/A

5. District of Columbia – Office of Unified Communication

Reference #:	**5**		
Company Name:	**Telecommunications Development Corp**		
X	**Vendor**		**Subcontractor**
Project Name	Next Generation 9-1-1 Implementation		
Primary Contact information			
Name:	Teddy Kavaleri, Chief Information Officer		
Street Address:	2720 Martin Luther King Jr Avenue, SE		
City, State, Zip:	Washington, DC 20032		
Phone, including area code	202-715-7557		
Facsimile, including area code	202-730-0514		
Email address:	Teddy.Kavaleri@dc.gov		
Alternate Contact Information			
Name:	Brittany Galloway, Program Manager		
Street Address:	2720 Martin Luther King Jr Avenue, SE		
City, State, Zip:	Washington, DC 20032		
Phone, including area code	202-724-7079		
Facsimile, including area code	202-730-0514		
Email address:	Brittany.Galloway3@dc.gov		
Project Information			
Brief description of the project/contract and description of services performed:	TDC is managing the implementation of the Next Generational 9-1-1 system for the District of Columbia to provide the ability for text, voice and video to be received as a function of a public safety call for service, for the same data to be made available to first responders via mobile devices and mobile data terminals, and to provide for the management of all text, voice and video data associated with the call for service.		
Original Project/Contract Start Date:	2015		
Original Project/Contract End Date:	Project in Progress		
Original Project/Contract Value:	$500,000		
Final Project/Contract Date:	Project in Progress		
Was project/contract completed in	N/A		

a time originally allotted, and if not, why not?	
Was project/contract completed within or under the original budget/cost proposal, and if not, why not?	N/A

IX. Proposed Staff Resumes



A. Project Manager – Deven Verma

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	Telecommunications Development Corporation

X **Contractor**	☐ **Subcontractor**

Name:	**Deven Verma**	x **Key Personnel**	
Classification:	Project Manager	**# of Years in Classification:**	18
Brief Summary of Experience:	Over 15 years of experience in managing enterprise scale, customer-focused programs with multiple concurrent projects. Served in the following industries Aerospace, Automotive, Education, Federal, Manufacturing, Online Retail, Publishing, and Telecommunication.		
# of Years with Firm:	8		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Feb 2009-Present** **Telecommunications Development Corp** **DC Department Of For Hire Vehicles: Taxicab Commission** **Jan 2016 – Present** **Project Manager** Drive and contribute to projects that rely on SalesForce from discovery through delivery: Gather requirements, collaborate with the team to define a solution, build it and train the users. Drive adoption and usage of SFDC through recurring training, on-boarding and communication of Best Practices. Work with end users during User Acceptance Testing (UAT) to accurately prioritize defects and re-test resolved issues; Integrate tool resources with new acquisitions / share knowledge / learn. Develop a deep understanding of various business units processes and goals. Hunt for opportunities to offer improvements: transform unofficial, disorganized processes into feature enhancements in SalesForce

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Charlotte** **Jun 2011 – Dec 2015** **Sr. Project Manager** Interface with CIO's office and manage relationships with vendors and system integrators (Cisco, Oracle, Verint, SalesForce, Symantec) to formulate and strategize 5-year strategic plan and explore applications, infrastructure and business processes to transition into hybrid cloud; make strategic decisions that drive service excellence, deployment, client satisfaction, security and contract performance. Oversaw the technical implementation of middleware, interface, and application integration of the Lagan CRM System in Charlotte. Provided Project Management of the Design and development where necessary interfaces to legacy systems Managed all aspects of Infrastructure & Operations including: Voice and Data Communications, Systems, Data Centers, ERP Systems, Messaging, End User Support, Service Desk, Risk, Change & Release management **DC Consolidated Forensics Laboratory** Feb 2009 – Jun 2011 Sr. Project Manager Project Manager for a team of Business Analysts, engineers (pre-sales, software), partner and client resources solution for the city of DC.
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 2007- Jan 2009** **Lagan Technologies** **Sr. Program Manager** Drove global sales growth and senior executive decision-making with creation of daily sales reporting and financial forecasting Hired and provided leadership to a 25 member multi-tiered, multi-disciplined international team implementing Lagan's 3-1-1 Citizen Relation Management solution

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 2005- Jan 2007** **Sun MicroSystems** **Program Manager** Managed a portfolio of projects at Sun's Managed Services group Created Business Operations budget through development of successful partnerships with stakeholders of multiple organizational levels. Built and managed P&L (project financial) level data to organize people and process
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Oct 2002 – Jan 2005** **AT & T** **Sr. IT Project Manager** Team lead for a group working on enterprise applications These applications reduced billing defects from 37% of all data ordering errors to 2%, helped improve order quality and managed customer billing disputes Held high-visibility position over enterprise-wide BSS application development strategy and integration, guiding on-site, offsite and offshore delivery teams in planning phase through deployment into production. Drove $2.7 million in cost savings; cut 35% off billing defects, spearheading best practices and process efficiencies regarding post-release customer refunds and billing reruns
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 1999 – Oct 2002** **General Motors** **Program Manager** Chaired the Divisional Cyber-activities committee and represented Division in the North America Web Council Setup GM's largest and most effective intranets with substantial real-time information about the Division's operations resulting in savings of $1.5 million Led the development and delivery of Global IT strategy across 8 countries in 3 continents for MFD

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**July 1994 – Jan 1999** **Informatics Inc**. **Vice President (of IT Services)** Managed all aspects of the day-to-day operations, conducted performance review of the Division staff, managed annual budget of $800,000 for four years Set up and managed offshore development centers in India and South Africa in 1996, before outsourcing became a norm in the IT industry **Internet Advisor** Interacted with clients on a daily basis, managed a diverse team and provided evaluations for the 21 direct reports on a quarterly basis Increased the client base by 900% in three years **Project Manager** Coordinated engineering support services for software development, engineering changes, and phased delivery for mission critical satellite projects

EDUCATION

Institution Name:	University of Maryland
City:	College Park
State:	Maryland
Degree/Achievement:	Electrical Engineering
Certifications:	No Certifications

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:	C++, Java, C, HTML, .NET	15 years
Hardware:	No Hardware	N/A
Software:	Windows Server 2000	15 years
Tools:	MS Powerpoint, Word, Excel	20 years
Databases:	SQL, MS SharePoint	15 years

REFERENCES

Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	

B. Technical Lead / Scrum Master – Michele Hudson

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	Telecommunications Development Corporation

X **Contractor**	**Subcontractor**

Name:	Michelle Hudson		**x** **Key Personnel**
Classification:	Technical Lead/Scrum Master	**# of Years in Classification:**	1
Brief Summary of Experience:	Michelle has over 16 years experience in managing the design, configuration, installation, administration and maintenance of IT systems. She is Technical Lead adept at overseeing large, complex IT projects spanning public, private, and nonprofit sectors. Through Michelle's vast knowledge and experience she has demonstrated ability to solve complex operational and logistic problems independently or as part of a team. Her strengths include critical thinking, knowledge of telecommunications and transmission technologies, programming applications and interfaces.		
# of Years with Firm:	1		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**05/2016 - 03/2017** **Telecommunications Development Corp** **Department of For Hired Vehicles** Earnest Chrappah 2235 Shannon Place se, St 3100; Washington DC 20020 (202) 645-7300; Project Manager / Business Analyst Modernization of the District of Columbia Taxi intake, enforcement application process with a Driver and Company portal based on the Salesforce platform; The project was broken out into three phases. Phase 2 - 7 months Service - Salesforce.com- Service Cloud; Classic Platform
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**11/2016 – 03/2017** **Phase One Consulting** **Amtrak –Long Haul Services** Sarabpreet Bumra 225 S. Canal St, Chicago, IL 60606 (202) 329-7752; bumraS@amtrak.com Project Manager / Business Analyst Pilot - Modernization of the train movement process for the Long Haul division of Amtrak Chicago Union Station. (4 months) Salesforce.com – Service Cloud; Lightning Platform

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**01/2012 – 10/2016** **Department of Human Services; Office of Information Systems** **Senior Program Manager** Provide governance and risk management for District of Columbia Access System (DCAS) program. Managed $200M budget resulting in the entry of modernization for DHS core mainframe system and document management with the inclusion of ACA Marketplace. Led Security Audit; to Automated IT systems to meet reporting requirements for DHS; to closed or mitigated 65% of the re-occurring findings from the Internal Revenue Service (IRS) Safeguards, Social Security Administration (SSA), and Centers for Medicare & Medicaid Services (CMS) annual reporting requirements for 5 DHS sister agencies
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**01/2010- 01/2012** **General Dynamics Information Technology** **Senior Principal Analyst** Product Manager for Healthcare Artifact and Image Management Solutions (HAIMS), serving Defense Health Information Management System (DHIMS) Managed $36M budget with a team of 4 engineers and a vendor with a team of 20; collaborating with technical and functional steering committees of 10 military medical officers from 4 services (Army, Navy, Air Force and Joint Staff) and subject matter experts, resulting in 60% reduction of radiation exposure of our Wounded Warriors
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**01/2008- 01/2010** **Acumen Solutions, Inc** **Senior Consultant Ii** Salesforce Project Manager / Solution Architect for Time Warner Cable, Comcast, Fandango, ARinc, AARP, 2010 Census Bureau and GSA (3 divisions) Streamlined AARP's operational and functional business processes, resulting in increased revenue recognition from $5M to $10M Implemented and deployed 12 Software as a Service (SaaS) Software projects via Salesforce.com, resulting in 97% user adoption through experience

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**01/2007- 01/2008** **ARC Solutions, Inc** **Senior Project Manager** Provided expertise in association management software and Agile Methodologies for Software Development to the Nonprofit Sector Managed 6 POLARIS ® implementation projects with budgets totaling $2.3M, staff of 2 business analyst and 2 developers Managed client expectations resulting in 80% support from frustrated clients
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**01/2000- 01/2007** **Knowledge Sharing Systems, LLC** **Senior Project Manager / Federal Division Lead** Provided technological expertise and support to federal laboratories, research universities, and advance technology companies using TechTracS ® innovation management software Managed 9 projects totaling $10.5M for 5 Federal Agencies (NASA, NIH, VA, DoD, and DoE) resulting in agencies awareness of 60% loss of their Intellectual Property to their contractors Facilitated initiatives for through TechTracS to issue out notices to claim the rights to intellectual assets from Contractors and Scientist; resulting in NASA being made aware of one contract billing them $1.1M in licensing fees for IP they rightfully owned Provided Congressional district research and development data using TechTracS ® resulting in a $34.5M appropriation to NASA Technology Transfer program Analyzed commercial activity metric reports for compliance with Government Performance Review Act (GRPA) for the Office of Management and Budget and Department of Commerce resulting in correcting 30% reporting errors

EDUCATION

Institution Name:	North Carolina State University
City:	Raleigh
State:	NC
Degree/Achievement:	B.S. Business Management
Certifications:	SFDC Admin (Exp)

HARDWARE/SOFTWARE SUMMARY (Be Specific)		
Description		***# of Year's Experience***
Environments:	No Environments	N/A
Hardware:	No Hardware	N/A
Software:	Salesforce.com	7 years
Tools:	No tools	N/A
Databases:	No Databases	N/A

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Sarabpreet Bumra Assistant Superintendent at Amtrak Amtrak – Chicago Union Station – Long Haul (202) 329-7752 bumraS@amtrak.com Boyle Stuckey Chief Information Officer DC – Department of Human Services (202)442-3273 Boyle.Stuckey@dc.gov Keely Wilson Deputy Program Executive Officer United States Department of Defense (571) 214-4665 knhicks@gmail.com

C. Salesforce Certified Architect – Babu Palanisamy

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	PracticeVantage LLC		
☐ **Contractor**		**X** **Subcontractor**	
Name:	Babu Palanisamy		☐ **Key Personnel**
Classification:	Technical Architect	**# of Years in Classification:**	3
Brief Summary of Experience:	Babu Palanisamy is a Salesforce Certified Technical Architect and provides Architecture & Design expertise for Salesforce.com implementations. In this capacity, Babu works with engagement teams to provide robust salesforce architecture solutions as well as to provide solution design and architecture guidance thoughout the engagement. With more than 17 years of experience, Babu has completed 60+ complete life-cycles of Salesforce implementations for customers across Federal Agencies, Financial Services, Manufacturing, Healthcare, High-tech, Media and Communications industries		
# of Years with Firm:	3 years		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Aug 2014 – Present** **PracticeVantage LLC** **Technical Architect/ Managing Partner** Chief architect for Salesforce products built for AppExchange marketplace Expertise in designing and building reusable lightning components for Salesforce Lightning Experience Managing development teams and providing architectural guidance and directions on building scalable applications in the force.com platform
Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Sep 2015 - Present** **PhaseOne Consulting Group** **Director, Technical Architecture** Architect for design and implementation of TaxiCab app for Department for Hire Vehicles, Washington, DC Build a Service Cloud and Driver/Company portal solution for DFHV enabling self-service capability for hundreds of cab companies and several thousands of cab drivers Responsible for Salesforce solution and technical architecture for Salesforce implementations across our federal agencies including USDA, DoD, Department of Interior Lead conversations with our customer's Enterprise Architects and Business Stakeholders with best practices for enterprise architecture functions such as Security, Performance, Development Process, and Application Governance. Manage customer expectations; negotiate solutions to complex problems with both the customer and third-party partners

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**June 2014 – Sep 2015** **Deloitte Consulting LLP** **Sr. Manager/Specialist Leader (Salesforce.com)** Perform as an Salesforce Engagement architect across multiple salesforce projects simultaneously Build and manage Deloitte CTA program for ensuring quality delivery across the customer implementations Develop best practices and framework for release management for internal use across the salesforce practice Provide guidance and estimate effort during SOW, pre-implementation, conceptual design, and build phases of engaement Perform assessement on architecture, security, org strategy, and app rationalization for multiple projects when needed Serve as a judge on Review Board Panel for Salesforce.com Technical Architect Certification Exam
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 2013 – June 2014** **PricewaterhouseCoopers LLP** **Senior Technical Architect** Responsible for Salesforce solution and technical architecture for our customers across the US Lead conversations with our customer's Enterprise Architects and Business Stakeholders with best practices for enterprise architecture functions such as Security, Performance, Development Process, and Application Governance. Develop scalable and maintainable integration solution using Standard Salesforce APIs as well as custom SOAP and REST APIs Drive the creation of technical design documents which leverage best practices and integrate Salesforce.com into the customer's infrastructure Develop integration architecture and solution design for Salesforce.com integrations with On-premise ERP/CRM Applications and ODS/Data Warehouse
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Feb 2012 – Dec 2012** **Wipro Technologies** **Senior Architect (SFDC)** Develop functional/technical designs and business processes for complex problems involving multiple applications Design, develop, and articulate solutions based on a customer's strategic business or technical requirements Conduct analysis on technical viability of solutions and provide guidance on delivery of complex integration projects Be responsible for the design of new applications and oversee the technical staff involved with developing projects Lead the implementation with respect to the delivery of the technical architecture designs, strategies, and quality assurance plans that will be delivered Work closely with Project Managers in the design, development, and implementation of the technical content defined in the Statement of Work Lead functional testing, conference room pilot sessions and training workshops to business users

EDUCATION	
Institution Name:	Pepperdine University
City:	Malibu
State:	CA
Degree/Achievement:	MBA
Certifications:	Salesforce Certified Technical Architect (CTA)

HARDWARE/SOFTWARE SUMMARY (Be Specific)		
	Description	***# of Year's Experience***
Environments:	Salesforce Force.com Platform	8
Hardware:	No Hardware	N/A
Software:	Salesforce	8
Tools:	Apex, Visualforce, Lightning Experience (LEX)	8
Databases:	Oracle, MS SQL, Force.com	8

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	1. Jeff Powrie, Engagement Director, Deloitte, jpowrie@deloitte.com 2. Mike Donnelly, Practice Director, Slalom, mdonnelly@slalom.com (267) 218 5523 3. Mandy Peckham, Director of Business Development, Privateer IT LLC, (360) 536 3425

D. Data Manager / SME – Dartanian Williams

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	Telecommunications Development Corporation

X **Contractor**	☐ **Subcontractor**

Name:	**Dartanion D. Williams**	x **Key Personnel**	
Classification:	Data Manager/ Subject Matter Expert	**# of Years in Classification:**	13+
Brief Summary of Experience:	Dartanion has a proven track record for aligning organizations to achieve excellence, streamline operations, and improve customer satisfaction through rigorous data analysis, operations management, strategic planning, and technology. Dartanion is a data-driven, savvy, energetic change agent with strong business and technical acumen complimented with a fine balance of practicality and creativity. He has a natural ability to build, motivate, mentor, and lead teams toward cohesion, high performance and continuous improvement and is skilled at identifying high-impact areas for performance or process improvement, using data to gain valuable insights, and leveraging technology to solving problems. Having held progressive leadership roles in data management, operations management, strategic planning, and performance management, Dartanion specializes in the following domains: Public Education, Transportation and Logistics, Government Operations, Public Safety & Justice, Information Technology, Business Intelligence, and Data Warehousing. Interested in medium to large scale projects with data analytics, operations management, systems implementation, and/or data integration components.		
# of Years with Firm:	2		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**04/2017 - Present** **Data Sciences Corporation** **Founder and Principal Consultant** Lead data management and process improvement projects for federal and local government agencies, non-profit organizations and small businesses. Services include application development, business intelligence, custom programming, data analytics, data visualization, geographic information systems (GIS), systems implementation, and systems integration. Consulting Projects include data management, data governance, visualization, and ETL

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**March 2015 – April 2017** **District Of Columbia Government, Executive Office Of The Mayor** **Director of Data Operations** Partnering with the Office of the Chief Technology Officer (OCTO) to implement the citywide Open Data Policy Support citywide Performance Management through data collection, analysis, reporting, and visualization, covering automated traffic enforcement, workforce development, vendor payments, 311 services, and violent crime Used data and applied research to advise the Mayor on strategies to improve the 311 service platform, small business permitting process, the Fire and EMS emergency response protocol, and combat issues such as traffic congestion in the District of Columbia Conducted research and data analysis to support the successful payout of over 2,000 active and former employees of the DC Fire & Emergency Department as part of a $50M class action lawsuit for incorrect overtime calculations based on an analysis of payroll data spanning fourteen years and three human capital systems **Chief Information Officer for the Department of For-Hire Vehicles** Served as the senior technical advisor on enterprise architecture, mobile app development, API development, and IT strategy Produced technical specifications for the development and implementation of the department's CRM platform Coordinated all activities to convert paper records to an electronic format and inventory them in the department's CRM system

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**August 2011 – March 2015** **District Of Columbia Government, Office Of The State Superintendent Of Education** **Chief Performance Officer** In collaboration with the program managers, developed key performance indicators for the division implemented a data-driven performance management system with automated data collection mechanisms. Provide strategic leadership to the logistics management, data and technology, and audit and compliance departments within the division, supporting the automation of technical processes, implementation and maintenance of technology systems. Led cross-departmental projects and coordinated major operational initiatives within the division, such as school start-up preparation resulting in the most successful school start-up in the division's history **Associate Director for Strategy and Technology** Led the alignment of technology systems to the evolving business processes with a team of data and applications analysts charged with implementing and stabilizing routing software, fleet management software, a suite electronic dispatch management systems, workforce timekeeping software, a GPS system for a fleet of over 700 vehicles, as well as managing the Medicaid reimbursement program and providing telecommunications support for the division Implemented a suite of transportation and logistics management software application, including Trapeze VeoTransportation for routing, scheduling, and logistics, FASTER Fleet Management for fleet management and maintenance tracking, Navman OnlineAVL for vehicle activity reporting using GPS, and a custom developed transportation request system, enabling efficient logistics and fleet management as well as monitoring of on-time performance and vehicle activity using GPS Managed a team of routing analysts charged with designing logistically sound routes and schedules for students of District of Columbia Public Schools in addition to Charter and Non-Public schools in the regional area. Led route optimization activities through an in-depth analysis of ridership activity and existing schedules, resulting a route reduction of over 15%

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**August 2004 – August 2011** **Chicago Public Schools** **IT Program Manager for Data and Applications** Served as the chief architect for defining sourcing strategies for data warehouse development and managed required application development work and knowledge transfer activities to facilitate local application development activities Managed an Operational Data Store and Enterprise Data Warehouse, which served as an integration hub for student information, human capital management, and enterprise resource planning systems in addition to external data sources. Maintained existing Operational Data Store (ODS) data models, designed and maintained data models for system enhancements and new data sources. Served as the primary analyst for technical requirements gathering and ETL design specifications and launched a SQL code repository to facilitate the maintenance of database objects Filled IT project management and business analysis role to implement four enterprise student information systems. Supervised full-time employees and project consultants to provide analysis, application support, customization development, reporting, configuration management, help-desk level-3 troubleshooting and overall system expertise to other project teams

EDUCATION

Institution Name:	Howard University
City:	Washington
State:	Distract of Columbia
Degree/Achievement:	Master of Business Administration
Certifications:	No Certifications

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:	Microsoft T-SQL, Oracle PL/SQL, Java; JavaScript; .NET; Python,	13 years
Hardware:	No Hardware	N/A
Software:	Microsoft Windows	13 years
Tools:	Mobile Application Design	2 years
Databases:	Quickbase, SalesForce, Qlik, Tableau	12 years

REFERENCES

Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	

E. Business Analyst – Michele Fennelly

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	Telecommunications Development Corporation

X **Contractor**	☐ **Subcontractor**

Name:	Michele Fennelly	x **Key Personnel**	
Classification:	Business Analyst	**# of Years in Classification:**	20 years
Brief Summary of Experience:	Michelle as almost two decades of project management experience. She is well-versed in different technology systems and data management. She thrives in fast paced environments and adapts to new challenges.		
# of Years with Firm:	17		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 2001-Present** **Telecommunications Development Corp** **Project Manager** **Project: DC Department Of For Hire Motor Vehicles** Managed Salesforce implementation to migrate core functions (driver licensing, vehicle licensing, complaint, enforcement and other workflow enabled processes) from multiple legacy systems and forms to include .Net and Quickbase applications Coordinated implementation of a self service portal for taxi and limo drivers and companies to provide agency functions for taxi and limo drivers and companies Responsible for improved customer service, process transparency and data quality enhancement Implemented communications and outreach strategy to include branding, messaging, target audience identification, stakeholder and public information campaigns Developed and maintained multi-level phased management reporting structures to include project plan, calendar, status reporting matrix Facilitated all requisite development activities to include User Acceptance Testing, User Stories, Product Specifications Conducted all requisite user training (multiple phases, modules) and provided onsite post support activities to ensure customer satisfaction of implementation

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Project: Department of Employment Services** I provide program and project management oversight for the implementation of the Document Taxonomy/Imaging project for the Office of Administrative Services within the Department of Employment Services in the District of Columbia. The scope of the project is to develop and implement a comprehensive program that maps the full lifecycle and disposition of all agency records
Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Project: Health Benefit Exchange Authority** I was responsible for managing a 30+ person staff in the implementation of the outreach strategy of DC Health Link. The outreach efforts were part of a citywide initiative to engage, educate and enroll uninsured residents of the District of Columbia into the DC Health Link health insurance marketplace.
Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Project: Consolidated Forensic Laboratory Construction Project** I was integrally involved in the design, construction, activation and operational phases of the project. The consolidation of three public safety stakeholders for the Government of the District of Columbia into one facility has involved multiple tasks including contract management, construction vendor compliance, lab equipment procurement, community outreach, operational readiness development, marketing collateral management and performance management reporting.
Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Project: Office of Unified Communications at the Unified Communications Center for the Government of the District of Columbia** My core responsibility included working individually on Integrated Network Management Systems and fiscally related projects, in conjunction with eight (8) project managers Technology systems used were Telephony, P25 Radio System Upgrade, Mobile Data Terminals, and Computer-Aided-Dispatch (CAD)

Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 1990 – Dec 2000** **Ericsson, Inc.** **Product Marketing Specialist** As the product marketing specialist, I was responsible for coordinated releases of any new hardware product as assigned. Developed all promotional materials in advance of release in coordination with sales team, project managers, research & development, and finance Provided support to Chief Executive Officer in the areas of budget tracking, scheduling, financial reporting and purchasing Initial coordination with research and development to track all schedule releases and product capabilities Marketing research with clients was conducted and feedback provided to project managers **Equipment Inventory Coordinator** I was responsible for the management of the physical inventory of all parts required for the production and assembly of Ericsson products (handsets, phones, radios, spare parts). Developed, formatted, and maintained inventory database of spare parts and radio/mobile phone inventory Responsible for maintaining and recording inventory physical assets Manage day-to-day use of radio, telephone and spare parts via sign-in/out system

EDUCATION	
Institution Name:	University of Pittsburgh
City:	Pittsburgh
State:	Pennsylvania
Degree/Achievement:	Bachelor Of Arts
Certifications:	No Certifications

HARDWARE/SOFTWARE SUMMARY (Be Specific)		
	Description	***# of Year's Experience***
Environments:	No Environments	N/A
Hardware:	Computer-Aided-Dispatch (CAD), Mobile Data Terminals (MDT)	16 years
Software:	Microsoft Office Suite	20 years
Tools:	Adobe Acrobat, Publisher, Visio	16 years
Databases:	MS Access, Excel, Word, PowerPont	20 years

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	

F. Senior Developer – Murali Rajendran

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	PracticeVantage		
☐ **Contractor**		**X** **Subcontractor**	
Name:	Murali Rajendran	x **Key Personnel**	
Classification:	Solution Architect and Lead	**# of Years in Classification:**	2
Brief Summary of Experience:	Customer focused and results oriented agile proponent. Technical and business leader with 20 years of 'get it done' cross-functional management, entrepreneur flair and experience in system and application development utilizing agile and traditional development processes. Experienced in leading cloud initiatives (Salesforce) with a detailed technical understanding of software engineering, business application solutions, and operations management. Consistently successful in delivering projects on time and on budget for clients in verticals like Health and Life Sciences, Education, Health Insurance and related areas. Broad range of experience in managing and leading multiple technical teams – onshore and offshore - to solve and deliver solutions to complex business problems. Core strengths include cultivating and managing highly functional teams through all phases of SDLC. Expert in building bridges between technology and business divisions to eliminate conflicts, improve understanding and cooperation to drive overall project results. Proven risk management, issue resolution and change control experience.		
# of Years with Firm:	3.5		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**May 2016 to August 2016** **PracticeVantage** **Telecommunications Development Corporation** **Department of For Hired Vehicles** Earnest Chrappah 2235 Shannon Place se, St 3100; Washington DC 20020 (202) 645-7300; Salesforce Solution Architect Modernization of the District of Columbia Taxi intake, enforcement application process with a Driver and Company portal based on the Salesforce platform; The project was broken out into three phases. Phase 2 - 7 months Service - Salesforce.com- Service Cloud; Classic Platform

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**June 2015 to Present** **PracticeVantage** 913 E Boston St, Gilbert, AZ 85295 (480) 420-9666 (Multiple projects on the Salesforce platform for various clients) Murali is responsible for organizing development effort, building and delivering intelligent and robust solutions on the Salesforce platform. Also helping in translating the vision of projects into solutions that follow architecture best practices and design patterns. Other responsibilities include leading technical requirements sessions, acting as a liaison between clients and internal development staff, architecting and documenting solutions, and developing interfaces between Salesforce and other systems. Also responsible for research on latest Salesforce technologies and new approaches to solution design.

EDUCATION

Institution Name:	Bangalore University
City:	Bangalore
State:	Karnataka, India
Degree/Achievement:	Bachelor of Engineering
Certifications:	No Certifications

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:	Salesforce and cloud computing	5+
Hardware:	Embedded Systems, RTOS	9+
Software:	Microsoft stack, Java stack, APEX, JavaScript, Salesforce Lightning	19+
Tools:	Debuggers, Profilers, Cloud platforms – Salesforce, Amazon AWS, Microsoft Azure	8+
Databases:	Microsoft SQL Server, MYSQL Server, HSQLDB	10+

REFERENCES

Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Jana Perry, Vice President Health Alliance Medical Plans jana.perry@healthalliance.org (217) 255-4544 Mayur Shah, CEO MK Education mshah@mkedu.org 630.929.8616 Arun Ramaswamy, Technical Architect BSI Software Ramaswamy_Arun@bsi.com (404) 791-9714

G. Developer / Configuration Specialist – Saurav Gorai

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	PracticeVantage		
☐ **Contractor**		**X** **Subcontractor**	
Name:	Saurav Gorai	x **Key Personnel**	
Classification:	Salesforce Developer	**# of Years in Classification:**	2
Brief Summary of Experience:	Saurav has 2 years of experience in Salesforce.com CRM, Force.com platform using Visual force, Apex classes. He has good experience in Designing, Development and Deploying Salesforce applications. He is also very good at Requirement Gathering and translating them to design, analyzing and validating user requirements, etc. His major focus areas are Apex and Visual force development. He is knowledgeable in Salesforce.com development platform and features like Web services, Batch Process, Sharing Model using Apex, Schedulable Apex, Configurations etc. Saurav also has a good knowledgeable in integrations , REST , SOAP APIs..		
# of Years with Firm:	1.5		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**Jan 2017 - present** **PracticeVantage** **Salesforce Developer** Adani Realty 913 E Boston St, Gilbert, AZ 85295 This Salesforce project was used as a Real Estate Management tool. We created customers' profiles and track his/ her progress of buying flats and calculating the cost of the same. This was also used to calculate the tax incurred and recurring payments if any. The management can track the sales team handling a particular customer and we developed this functionality. Service - Salesforce.com ; Classic Platform

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	**June 2016 - June 2017** **PracticeVantage** 913 E Boston St, Gilbert, AZ 85295 (480) 420-9666 The product is an Employee Management Application built in Salesforce.com. This application can be used by organization to track the amount of work done by employees on a particular day, track its financial management, its assets, its projects etc. Salesforce platform

EDUCATION

Institution Name:	Vellore Institute of Technology
City:	Vellore
State:	Tamil Nadu, India
Degree/Achievement:	Masters in Computer Science
Certifications:	No Certifications

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:	Salesforce and cloud computing	2+
Hardware:	Embedded Systems, RTOS	N/A
Software:	Visual Force, APEX classes and Triggers, Javascripts, Force.com IDE and migration tool, Sandbox data loading, Eclipse IDE Plug-in, Apex Data Loader.	4+
Tools:	Cloud platforms – Salesforce,	2+
Databases:	Salesforce cloud	2+

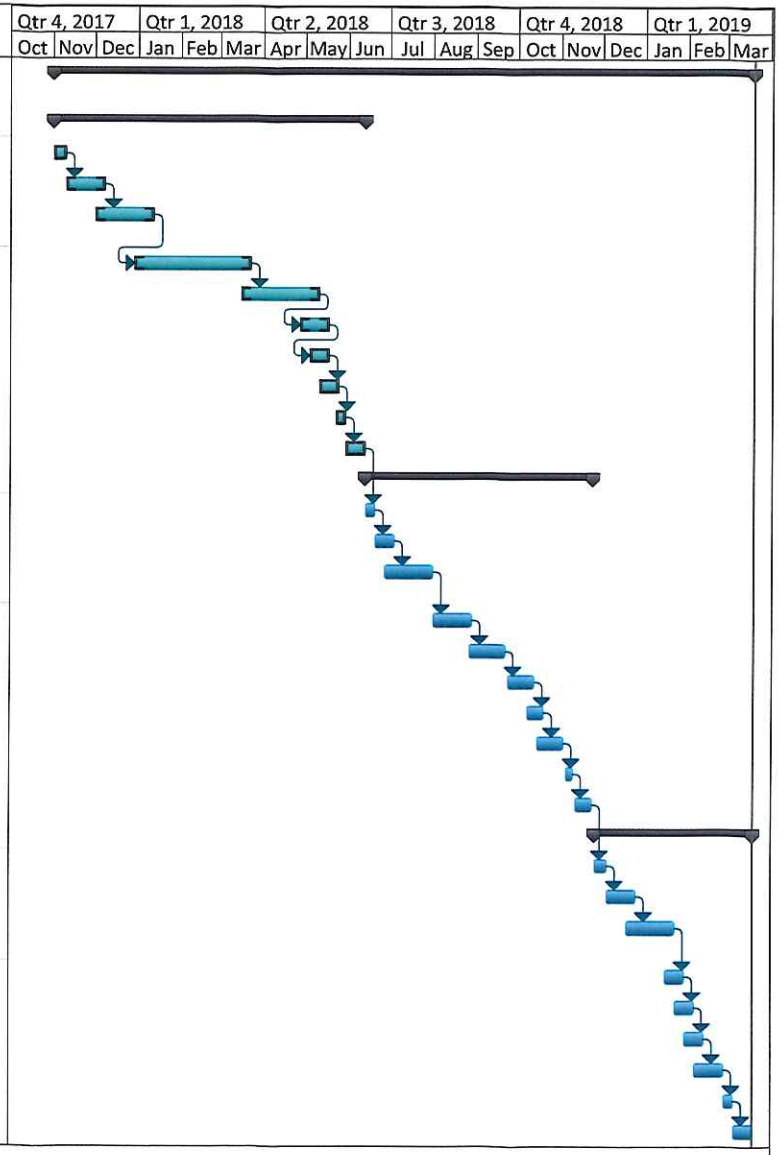
REFERENCES

Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Anshul Jain, CEO ABSYZ Inc Anshul.jain@absyz.com (650) 282-0065

X. Preliminary Project Plan

The following is a proposed project schedule for the implementation of the TA RMS.

ID	Task Mode	Task Name	Duration	Start	Finish	Predecessors
1		Nevada Taxicab Authority RMS Modernization	360 days	Wed 11/1/17	Tue 3/19/19	
2		**Phase I - Permitting**	**160 days**	**Wed 11/1/17**	**Tue 6/12/18**	
3		Planning and Administration	7 days	Wed 11/1/17	Thu 11/9/17	
4		Review and Validate Requirements	20 days	Fri 11/10/17	Thu 12/7/17	3
5		System Design / Implementation Configuration	30 days	Fri 12/1/17	Thu 1/11/18	4FS-5 days
6		Setup / Configuration / Build	60 days	Fri 12/29/17	Thu 3/22/18	5FS-10 days
7		Data Migration	40 days	Fri 3/16/18	Thu 5/10/18	6FS-5 days
8		User Acceptance Testing	15 days	Fri 4/27/18	Thu 5/17/18	7FS-10 days
9		Documentation	10 days	Fri 5/4/18	Thu 5/17/18	8FS-10 days
10		Training	10 days	Fri 5/11/18	Thu 5/24/18	9FS-5 days
11		Transition to Production	5 days	Wed 5/23/18	Tue 5/29/18	10FS-2 days
12		Post Implementation Review	10 days	Wed 5/30/18	Tue 6/12/18	11
13		**Phase II - Enforcement and Mobile Integration**	**118 days**	**Wed 6/13/18**	**Fri 11/23/18**	
14		Planning and Administration	5 days	Wed 6/13/18	Tue 6/19/18	12
15		Review and Validate Requirements	10 days	Wed 6/20/18	Tue 7/3/18	14
16		System Design / Implementation Configuration	25 days	Wed 6/27/18	Tue 7/31/18	15FS-5 days
17		Setup / Configuration / Build	20 days	Wed 8/1/18	Tue 8/28/18	16
18		Data Migration	20 days	Mon 8/27/18	Fri 9/21/18	17FS-2 days
19		User Acceptance Testing	15 days	Mon 9/24/18	Fri 10/12/18	18
20		Documentation	10 days	Mon 10/8/18	Fri 10/19/18	19FS-5 days
21		Training	15 days	Mon 10/15/18	Fri 11/2/18	20FS-5 days
22		Transition to Production	5 days	Mon 11/5/18	Fri 11/9/18	21
23		Post Implementation Review	10 days	Mon 11/12/18	Fri 11/23/18	22
24		**Phase III - Taxicab Company Portal**	**82 days**	**Mon 11/26/18**	**Tue 3/19/19**	
25		Planning and Administration	7 days	Mon 11/26/18	Tue 12/4/18	23
26		Review and Validate Requirements	15 days	Wed 12/5/18	Tue 12/25/18	25
27		System Design / Implementation Configuration	25 days	Wed 12/19/18	Tue 1/22/19	26FS-5 days
28		Setup / Configuration / Build	10 days	Wed 1/16/19	Tue 1/29/19	27FS-5 days
29		User Acceptance Testing	10 days	Wed 1/23/19	Tue 2/5/19	28FS-5 days
30		Documentation	10 days	Wed 1/30/19	Tue 2/12/19	29FS-5 days
31		Training	15 days	Wed 2/6/19	Tue 2/26/19	30FS-5 days
32		Transition to Production	5 days	Wed 2/27/19	Tue 3/5/19	31
33		Post Implementation Review	10 days	Wed 3/6/19	Tue 3/19/19	32



Project: Nevada Taxicab RMS - Dr
Date: Wed 6/14/17

Task		External Tasks		Manual Task		Finish-only	
Split		External Milestone		Duration-only		Deadline	
Milestone		Inactive Task		Manual Summary Rollup		Progress	
Summary		Inactive Milestone		Manual Summary			
Project Summary		Inactive Summary		Start-only			

XI. Requirements Matrix

STATE OF NEVADA	
RFP # 3422	
Taxicab Authority Function	
BR01	Taxi Driver Permits
BR02	Certificate Holders
BR03	Medallions
BR04	Enforcement
BR05	Vehicle Inspections
BR06	Dispatch /Events
BR07	Web Portal
BR08	Reports Management
BR09	Interfaces
BR10	Technology
BR11	Conversion

Nevada Taxicab Authority Records Management System Modernization RFP # 3422

BR01 - Taxicab Driver Permit

The Taxicab Driver's Permit application is undergoing a revamp in process due to the introduction of new technology. To obtain a Taxicab Driver Permit, an applicant applies with a cab company and has successfully completed the initial Taxicab Driver's Test. The taxicab company then issues a referral and a Successful Initial Test notice. The applicant can then begin the Taxicab Driver's Permit application process. The long term vision expects to have Taxicab Company (Certificate Holders) web portal where all required forms for the Permit process will be submitted from this web portal to the TA. Currently these forms are paper based and will be scanned and attached to the applicants Taxicab Driver's Permit application. The driver will complete the Taxicab Driver's Permit application online initially using computers available at the Taxicab Authority along with providing the required documents that again will be attached to the applicants application. The long term version will have this process available through a Taxicab Driver's portal where completed applications will be submitted into a TA Permit workflow queue for TA staff review and processing. The TA will collect an initial Application fee of $51.25 and a computerized preliminary background check and fingerprint check is done. The TA will issue a 90-day temporary permit with a TA Permit # assigned, a photo of the applicant is taken, a training class is scheduled for a future date. If no issues with the fingerprint check or background check are identified upon return (approx. 2-4 weeks later), the driver will be contacted to returns to the TA and is issued a permanent permit after paying a $10.00 Permit Reprint fee.

The TA Taxicab Driver Permits include a color photo of the driver, a unique TA Permit #, physical descriptors, expiration dates, additional information, and an electronic signature of the Administrator in blue, with fonts in black and red. **A new requirement will be the printing of a barcode (format to be determined) of the Taxicab Drivers Permit Number on the printed permit form for scanning by wireless hand-held devices and wired barcode scanners.** Auto-population of Taxicab driver information.

The TA requires background verification with various mandated Federal and State entities including fingerprint verification prior to issuance of the Driver's Permit.

combination driver.

The designation will be derived through a checkbox or drop down box selection on the TA RMS Permit module. Also required will be the Taxicab company name issuing a referral (employee driver or lease driver referral), and the lease contract expiration date. It is a requirement for the lease contract dates to be entered into the new TA RMS Permit module. Multiple leases can occur for different periods of time but they cannot overlap. It is a requirement that once a lease contract is entered into the TA RMS Module a change in permit status is triggered (permit status is separate from permit expiration). **The lease-only driver permitting procedure is identical to the employee-only driver permit permitting process**.

It is a requirement that the TA RMS module data (Read Only) be available to TA Agency staff, via multiple platforms (wireless hand-held devices issued by the TA) for verification of the Taxicab driver information by TA Permit #. Data available includes permit status, and citation history and TA Permit photo (with search capabilities in other fields to arrive at the TA Permit #).

The TA renewal processes will be available TA front office during the Pilot period and will be available on the Taxicab Driver's portal. The Taxicab Driver Permit Renewal process does include a fingerprint check but does include a background check (SCOPE). The renewal fee is $10.00.

Currently, driver permits are valid for up to one year. If the permit is expired for 366 days, issuance of a new permit must follow the "Original Issuance" procedure, rather than the renewal

Please see: NAC 706.525 and NAC 706.528 for further details.

The TA issues Taxicab Driver Permits (for employee drivers, lease drivers, and employee/lease drivers) to customers. The permits are printed, laminated (5" x 7"), and issued at the work stations, immediately upon approval of application/renewal.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desire	Vendor Response	Vendor Response Explanation
BR01.01	**TA Driver's Permit - Original Issuance (or reapplication when expired at least one day)**	The system shall allow for The Taxicab Driver Permit Application Form fields to become the main input screen for the Taxicab Driver's Permit process. In addition the system shall allow for e-mail address and communication preference (e-mail/text/phone).	M	S	Standard Salesforce features allow declarative development of custom fields and logic without any coding. We will be leveraging these features. Throughout this document, we have specified the standard out of the box Salesforce functionality as 'S' under Vendor Response

BR01.02	**Applicant**	The system will allow for Driver Permit type drop down selections such as, but not limited to: Driver, Lease Driver, Employee Lease Driver during the initial application information entry. This selection should a mandatory field where a selection must be made before a submission of the application is allowed.	M	S	
BR01.03	**Applicant**	The system shall allow for the Taxicab Company (Certificate Holder) to submit the following uploaded forms or information to the TA for a New Taxicab Driver's Permit application for a new applicant. • Taxicab Driver Referral form • Proof of successful passing the taxicab drivers permit test. • Proof of attendance for the Driver's Awareness Program (DAP) Class. **This feature will be available when the Taxicab Company web portal is online but the system should allow this information to be recorded on the applicants Permit screen when entered at the TA office.**	M	S	For the web portal, we will be using the Salesforce Community Cloud.
BR01.04	**Applicant**	The system shall prompt the applicant for the uploading of the following TA Required Forms. The uploaded forms should include the Form Name as prompted with the Nevada Driver's License prefix as the file name to the applicant's application. Child Support Form, DOT Medical Form, Authorization for Release of Information, Fingerprint Background Waiver Form	M	S	
BR01.05	**Applicant**	The system shall allow the applicant to Submit the completed Taxicab Driver's Permit Application if all mandatory fields have entries. The application should be submitted into the Incoming Application Queue with a application status of 'submitted'	M	S	
BR01.06	**TA**	The system shall allow for a workflow process to route submitted permit application from the Incoming Application Queue to an available signed-on TA Front Desk staff member.	M	S	
BR01.07	**TA**	The system shall allow for the routing of the Taxicab Drivers Permit Application to the Administrative Investigators work queue if a response of 'Yes' is selected on any of the Criminal Background Questions.	M	S	
BR01.08	**TA**	The system shall allow the TA Front Desk Staff member to Open and review the application for completeness of information and verification of documents submitted. Once the application is opened the application status should be updated to 'Review' with a timestamp. The TA Front Desk Staff will call the applicate to the appropriate window for verification of the application.	M	S	

BR01.09	**TA**	The system shall allow the TA Front Desk Staff member to insert notes into the application identifying any missing documentation that is required for the application to proceed. If the applicant cannot provide the missing documentation then the TA staff member will Save and close the application. The status of the application will be update to 'Info Needed' and the application will remain in the Incoming workflow queue until the applicate returns to the TA office with the required documentation.	M	S	
BR01.10	**TA**	The system shall allow the TA Front Desk Staff member to proceed with the next step if all application information and documents are correct. The photo of the applicant will be taken and uploaded to the applicant screen and a TA# will be generated and included on the application screen.	M	S	
BR01.11	**TA**	The system shall allow for the payment of $51.25 once the Taxicab Drivers' Permit application has been reviewed and all required information and documentation is correct. The TA staff member will process the application payment and provide a receipt to the applicant or enter an e-mail address to e-mail the receipt to the applicant.	M	S + C + O	Payment processing requires an additional AppExchange product. Some custom development will be required to satisfy this requirement to integrate Salesforce functionality with Payment processing application. We are proposing to use Hosted PCI
BR01.12	**TA**	The system shall allow for the printing of a 90-day temporary permit which includes the applicants photo, physical description and a barcode (TA#). The permit form is a (5" x 7") and is laminated with the Nevada State Seal.	M	S + C	We will output the permit in industry standard high resolution PDF files. The TA can then print these permits using already available printer(s). Some custom development is necessary to get this functionality.
BR01.13	**TA**	The system shall allow the TA Staff member to capture the SCOPE background check control information on the applicant screen. No Criminal History records are recorded or captured. Once the TA staff member Saves and closes the application the application status should be changed to 'Background'.	M	S	
BR01.14	**TA**	The system will allow the TA Front Desk Staff to notify the applicant via their communication preference when their fingerprint background check has been received and an appointment can be made to come into the TA Office to turn in the temporary permit and be issued a permanent permit. Once the contact information is entered into the application and the record is Saved the application status should be updated to 'Notified'.	M	S	

BR01.15	**TA**	The system shall allow for the printing of the Permanent Permit and a $10.00 Permit Reprint Fee payment and provide a receipt to the applicant or enter an e-mail address to e-mail the receipt to the applicant. Once the Permit is printed and the record Saved, the status of the application should be updated to 'Complete' and the application removed from the queue.	M	S + C	
BR01.16		The system shall provide an electronic signature process for applicant signature capture.	M	S + C + O	Electronic signatures require additional AppExchange software plus custom development. We are proposing to use eSignLive that integrates well with Salesforce to satisfy this requirement
BR01.17		The system shall allow for manual entry of NCJIS negative response.	M	S	
BR01.18		The system shall allow for manual date and time entry of when NCJIS response received.	M	S	
BR01.19		The system shall allow for the complete tracking of all Taxicab Driver's Permit Applications through the system regardless of status.	M	S	
BR01.20		The system shall allow for Supervisory staff to assign Taxicab Driver's Permit applications to TA Staff for review and processing.	M	S	
BR01.21	**Lease**	The system shall prompt for addition required information when categorized as a Lease Driver such as cab company name and lease contract start and end	M	S	
BR01.22		When designated as a **Lease Driver permit**, when all lease contracts are expired, the system shall auto-change the permit status to inactive	M	S	
BR01.23		When a Lease Driver permit record is queried, all non-expired lease contracted cab companies will display	M	S	
BR01.24		The system shall provide for a "permit type" designation of "Driver" and "Lease", allowing for either or both to be selected. If "lease" is selected either alone or in conjunction with "Driver", additional data must be able to be captured such as lease contract information.	M	S	
BR01.25		The system shall provide for a Permit status designation for each permit type ("Driver" and "Lease") such as, but not limited to: Active, Inactive, Expired, Terminated, Suspended, Revoked, Temporary, Incomplete, Expired	M	S	
BR01.26		The system shall display the latest customer/driver image to the technician.	M	S	
BR01.27		The system shall retrieve the latest outstanding fine information.	M	S	

BR01.28		The system shall allow for the inquiry, changes, to administrative court records.	M	S	
BR01.29		The system shall prompt for addition required information when noted as a Lease Driver	M	S	
BR01.30		The system shall accept customer electronic signatures.	M	S + C + O	Electronic signatures require additional AppExchange software plus custom development. We are proposing to use eSignLive that integrates well with Salesforce to satisfy this requirement
BR01.31		The system shall interface with the Real-time tracking system - future (SB430)	M	S	
BR01.32		The system shall allow for manual entry of NCJIS negative response	M	S	
BR01.33		The system shall allow for manual date and time entry of when NCJIS response received	M	S	
BR01.34		The system shall allow for manual entry of SCOPE negative response	M	S	
BR01.35		The system shall allow for manual date and time entry of when SCOPE response received	M	S	
BR01.36		The system shall allow for the application process to be routed to the Administrative Investigator, tracking the date & time of the route at the manual determination of the application processing staff with comments	M	S	
BR01.37		The system shall allow for the Administrative Investigator to re-route the application process back to the application processing staff with comments	M	S	
BR01.38		When the permit status is changed from "temporary" to "Active", the system shall change the expiration to one year to the calendar day of the date of the initial temporary permit issue date.	M	S	
BR01.39		The system shall generate a confirmation sheet document for the content to be confirmed by the applicant/driver prior to final printing of the TA Permit.	M	S	
BR01.40		The system shall allow for the capture of customer approval of confirmation sheet.	D	S	
BR01.41		The system shall generate a unique Driver Permit number (TA number).	D	S	
BR01.42		The system shall assign an initial expiration date of 90 days, allowing for manual adjustment when the status is "temporary".	M	S	
BR01.43		The system shall generate the permit Issue dates.	M	S	
BR01.44		The system shall generate the required permit fees.	M	S	

BR01.45		The system shall accept customer payment.	M	S + C + O	Payment processing requires an additional AppExchange product. Some custom development will be required to satisfy this requirement to integrate Salesforce functionality with Payment processing application. We are proposing to use Cybersource Integrat
BR01.46	**TA Permit Renewal**	The system shall generate TA Permit renewal notices using designated communication preferences according to the applicant/driver profile.	M	S	
BR01.47		The system shall allow an inquiry on the TA Permit status through all available fields	M	S	
BR01.48		The system shall allow for the creation, inquiry, changes, and cancelation of renewal TA Permits.	M	S	
BR01.49		The system shall allow for scanning and uploading of submitted TA Permit application/renewal documentation.	M	S	We are proposing that TA users will scan documents on their desktops using COTS scanning software/hardware. These scanned documents can then be uploaded to Salesforce directly on the applicable record
BR01.50		The system shall allow for scanning and uploading of submitted TA Permit physical certification	M	S	
BR01.51		The system shall allow for the creation, inquiry, changes, and deletions of Driver Permits	M	S	
BR01.52		The system shall allow for scanning and uploading of submitted Driver Permit renewal documentation.	M	S	
BR01.53		The system shall allow a renewed Driver Permit status such as, but not limited to: Active, Inactive, Expired, Terminated, Suspended, Revoked, Temporary, Incomplete, Expired with Fine, Inactive with Fine, etc.	M	S	
BR01.54		The system shall capture Customer information such as, but not limited to: Customer legal name, middle initial, prefix (Mr., Mrs., etc.), suffix (Jr., III, etc.), physical residence address, mailing address, cell phone number, alternate phone number, e-mail address	M	S	
BR01.55		The system shall capture customer identity information such as, but not limited to: Date of birth, Race, Gender, Height, Weight, Hair Color, Eye Color, Sex, etc.	M	S	
BR01.56		The system shall capture customer PII information such as, but not limited to: SSN Number, Driver's license number with State, Driver's license expiration date, Etc.	M	S	

BR01.57		The system shall capture medical requirements such as, but not limited to: Physical (medical card) date, Medical Card expiration etc.	M	S	
BR01.58		The system should verify the mailing address against the U.S. Postal Service or a like service in alignment with the U.S. Postal Service	M	S + C + O	Verification of Mailing Address needs integration with additional AppExchange products
BR01.59		The system shall capture Driver Permit type such as, but not limited to: Driver, Lease Driver, etc.	D	S	
BR01.60		The system shall require specific customer documentation based on permit-type selected (driver permit or lease driver permit).	M	S	
BR01.61		The system shall allow for renewal through the web-portal, refer to web-portal tab.	M	S	
BR01.62		The system shall provide the ability to waive renewal fees due to extenuating circumstances. A summary of fees waived shall be available for reporting purposes.		S	
BR01.63	**Renewal Issuance by alternate services**	The system shall generate renewal notices.	M	S	
BR01.64		The system shall accept customer address information.	M	S	
BR01.65		The Permit issuance shall issue the TA Permit as listed above.	M	S	
BR01.66		The system shall accept electronic payments.	M	S + C + O	Payment processing requires an additional AppExchange product. Some custom development will be required to satisfy this requirement to integrate Salesforce functionality with Payment processing application. We are proposing to use Hosted PCI
BR01.67			M		
	TA Permit - Duplicate Issuance	The system shall allow an inquiry on the TA Permit such as, but not limited to: TA Permit number, Customer name, AKA, etc.		S	
BR01.71		The system shall allow for the creation, inquiry, changes, and cancelation of Duplicate TA Permits.	M	S	
BR01.72		The system shall allow a Driver Permit status such as, but not limited to: Active, Inactive, Expired, Terminated, Suspended, Revoked, Temporary, Incomplete, Expired with Fine, Inactive with Fine, etc.	M	S	
BR01.73		The system shall allow for scanning and uploading of submitted TA Permit application documentation.	M	S	

BR01.74		The system shall allow for scanning and uploading of submitted TA Permit physical certification	M	S	
BR01.75		The system shall capture duplicate indicators such as, but not limited to: Stolen, Lost, etc.	M	S	
BR01.76		The TA Permit issuance shall issue the TA Permit as listed above.	M	S	
BR01.77	**CDL - Clearance Letter**	The system shall allow an inquiry on the CDL Card such as, but not limited to: CDL/ CDL number, Customer name, AKA, etc.	M	S	
BR01.78		The system shall allow TA staff to generate a clearance transaction with the option to print a hard copy if	M	S	
BR01.79		The system shall allow TA staff to generate an electronic clearance notice to the email address on record, if requested.	M	S	
BR01.80		The system shall allow for scanning and uploading of submitted clearance letter documentation.		S	
BR01.81		The system shall send clearance letter to the customer correspondence management system.	M	S	
BR01.82		The system shall allow clearance letter to have specific verbiage to include, but not limited to: Name, address, clearance date, etc.	M	S	
BR01.83	**Suspension - Failure to Appear, failure to comply, delinquent fines**	The system shall retrieve customer records based on CDL/ID number received in batch file.	M	S	
BR01.84		The system shall capture court information such as, but not limited: Court citation number, Citation date, Event number, etc.	M	S	
BR01.85		The system shall update the Suspension action on customer record.	M	S	
BR01.86		The system shall generate notification to the current cab company(ies) for which the driver is employed and/or from which company the driver is leasing.	M	S	
BR01.87		The system shall send all notices to the customer correspondence management system.	M	S	
BR01.88	**Suspension/Revocation - Judgments**	The system shall allow for changes to the status of the TA Permit based upon citation/court workflow process	M	S	
BR01.89		The system shall capture attorney information such as, but not limited to: Attorney company name, representing attorney, address, contact information, etc.	M	S	
BR01.90		The system shall retrieve driver records based on TA Permit number.	M	S	
BR01.91		The system shall update the Suspension/Revocation action on customer record.	M	S	
BR01.92		The system shall send all notices to the customer correspondence management system.	M	S	
BR01.93		The system shall send all notices to the customer correspondence management system.	M	S	

BR01.94		The system shall allow an CDL Card status such as, but not limited to: Active, canceled, denied, hold, deceased, suspended, etc.	M	S	
BR01.95		The system shall process a workflow process at 6:01 pm each weekday that will generate a delinquent fine report (to include payment plans) and place the TA Permit status into "suspended" for those identified on this report. A fine is delinquent if it was due that day by 6:00 pm. These times must be able to be modified by the system	M	S	
BR01.96		The system shall generate a notification to the cab company immediately thereafter, notifying of the suspension, providing the TA # and citation #.	M	S	
BR01.97		The system shall send notice to the customer correspondence management system notifying the TA Permit holder/driver of the suspension, providing the	M	S	
BR01.98		The system shall allow for electronic and mobile payment to be applied to the delinquent fine, and if paid, shall allow immediate change in TA Permit status to "active", if no other existing cause for suspension or revocation exist.	M	S	
BR01.99		The system shall retrieve customer records based on CDL/ID number received in batch file.	M	S	
BR01.100		The system shall capture court information such as, but not limited: Court citation number, Citation date, Case number, etc.	M	S	
BR01.101		The system shall capture court delinquent fines information such as, but not limited: Fine amount, date,	M	S	
BR01.102		The system shall allow for the creation, inquiry, changes, and cancelation of denial Requests.	M	S	
BR01.103		The system shall allow for scanning and uploading of submitted denial documentation.	M	S	
BR01.104		The systems shall place TA Permit denials into a Case management system.	M	S	
BR01.105		The system shall allow review and approval of TA Permit denials in the case management system.	M	S	
BR01.106		The system shall retrieve customer records based on CDL/ID number received.	M	S	
BR01.107		The system shall send all notices to the customer communications preference selected by the driver. This option should be available for update on the Taxicab Driver's Web Portal with an audit trail of all changes.	M	S	
BR01.108	**Confidential Physicians Report**	The system shall allow for uploading of the Medical Examiner's Certificate to be appended to the TA Permit record	M	S	
BR01.109		The system shall require the manual entry of the "Medical Certification Expiration Date"	M	S	

BR01.110		The system shall process a workflow process at 12:01 am each day (7 days/week) that will generate medical Certification expiration report and provide the Taxicab Driver with notices through the customer communications preference of those certifications going to expire in 30 days and 15 days prior to expiration.	M	S	
BR01.111		The system shall process a workflow process at 12:01 am each day (7 days/week) that will generate an expired Medical Certification report and place the TA Permit status into "suspended" for those identified on this report. Medical Certifications expire at 12:00 am of the day following the listed expiration date.	M	S	
BR01.112		The system shall provide notices to the TA Permit holder and the Certificate Holder through the customer correspondence management system preferred communication method of the suspension.	M	S	
BR01.113		The system shall generate a notification to the cab company immediately thereafter, notifying of the suspension, providing the TA # and expiration date.	M	S	
BR01.114		The system shall protect all medical information using HIPPA guidelines.	M	S	
BR01.115	**TA Permit Terminations**	When the system receives a "termination notice" through he web portal, the system shall compare the cab company name on the termination notice to the currently named cab company of the TA permit records. If the company name matches, the TA permit status shall change to "terminated". If the company name does not match, the "termination notice" shall post to the TA permit history and a notice shall be submitted to TA staff through further defined business rules.	M	S	
BR01.116	**Photo Line up**	The system shall provide for a method to generate a photo line up based upon searchable fields such as but not limited to physical description in the permit file and print the selected photos in a photo line-up manner.	M	S	
BR01.117	**Incomplete Records**	The system shall allow for an expiration and archival of incomplete permit applications after a set time-frame, to be determined according to retention guidelines.	M	S	

BR01.118		**The system allow for the testing of applicants if driver testing has not become the responsibility of the individual Certificate Holders.**	M	S + C	Custom development will be needed to build the Testing module. Further, customization will be required to expose the tests to the candidates in a secure manner as specified in this requirement
	TA Permit Testing	The system shall provide for a testing module consisting of a bank of approximately 100 questions, randomly assigning fifteen to each driver test.		S + C	
BR01.119		The system shall allow for the addition of test questions and the retirement (not deletion) of test questions with associated dates of being active or inactive.	M	S + C	
BR01.120		The system shall require the test taker to log into the testing module using the driver's license number	M	S + C	
BR01.121		The testing module shall not be available on the web	M	S	
BR01.122		The system shall allow for one login and submission of answers per calendar day per driver's license number	M	S	
BR01.123		The system shall provide for all attempts to be tracked and maintained as historical records by driver's license number, and TA # when applicable (once TA # has been	M	S	
BR01.124		The system shall provide for the capture of test scores on a pass/fail basis	M	s	
BR01.125		The system shall require an established passing score prior to issuance of a new taxicab permit.	M	s	
BR01.126		The system shall submit test results to append to the TA permit application record	M	s	
BR01.127		The system shall capture statistical information on test questions answered correctly, incorrectly, number of tests taken per applicant, allowing for date ranges, and other associated statistical parameters. This will be included in the TA monthly statistics report previously identified under the Reports module, as well as for ad-hoc	M	s	
BR01.128	**Payment Processing**	The system shall provide a payment 'Add to Cart' type feature for both invoicing, payment and receipt payment processing.	M	S + C + O	
BR01.129		The system shall allow for payment of all fees and fines to be by Credit/Debit card, and exact change cash. TA Front Desk staff do not use Bank Draws.	M	S + C + O	
BR01.129		The system shall provide for an end-of-shift reconciliation and balanceing process with a audit report for accountability of all fees accepted.	M	S	

BR01.129	**Conunterfit Money**	The system shall allow for a counterfeit money tracking process.	M	S + C + O	The payment gateway should be able to approve electronic transactions and prevent fraud. Detecting counterfeit money during physical monetary transactions at the TA office will have to be done by following regular observation
BR01.130		The system shall capture payment types allowed such as, but not limited to: Cash, Credit Card Type (Visa, MasterCard, Amex, Discover, etc.), Debit Cards (Pinless, pin based, signature), check, eChecks, Wire/EFT, JV, etc.	M	S + C + O	
BR01.131		The system shall interface with the TA's existing credit card processor.	M	S + C + O	
BR01.132	**Revenue Recovery**	The system shall allow for a Revenue Recovery process for fines or fees not paid).	M	S	
BR01.133	**Fine Payment Plans**	The system shall allow payment plans to be created for Taxicab Drivers Citation payments based on current Business Rules.	M	S	
BR01.134	**Bonds**	The system shall provide a method to capture bonds received, link the bond receipt to the associated records, and provide an ability to keep the bond or return it, based upon	M	S	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR03 - Medallions					
The Taxicab Authority issues metal medallion plates, 4" x 7" to Certificate Holders, which must be attached to a taxicab prior to being available for service. Medallions are not permanently affixed to a					
Vehicle plates and sub-plates can be issued at time of new vehicle registration, plate substitution, or may be transferred to another vehicle. Medallions are issued annually (plate substitution), as a					
The Taxicab authority issues approximately three (3) medallion types: permanent, handicap, and temporary					
The Taxicab Authority issues different alpha-numeric sequencing to each of the sixteen (16) taxicab companies, i.e., Y345 (Yellow Cab Co.), W345 (Western Cab Co.), etc.					
Medallions are currently issued at the Taxicab Authority office.					
The Taxicab Authority issues different quantities to different companies, dependent upon Certificate of Public Convenience and Board Ordered quantities.					
Medallions are issued to Certificated Taxicab Companies and are not transferable to other companies.					
The Taxicab Authority plans to move to electronic medallions upon implementation and in support of NRS 706.88183.					
Permanent medallions do not have an expiration date but are physically exchanged for a new set when TA Staff requires (approximately annually)					
The medallions are allowed to be moved from one authorized taxicab to another.					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired (F)future**	**Vendor Response**	**Vendor Response Explanation**
BR03.01	**Medallion Issuance**	The system shall allow for the creation, inquiry, changes, and deletions of medallion plates and status	M	S	
BR03.02		The system shall capture medallion information as defined in the attached Requirements Specs document.	M	S	
BR03.03		The system shall link the medallion to various TA functions such as, but not limited to: Certificate Holders, Inspections, Events,	M	S	
BR03.04		The system shall allow a medallion classification such as permanent, handicap, and temporary, etc.	M	S	
BR03.05		The system shall allow a medallion plate status such as, but not limited to: Active, New, Not Issued, Damaged, Lost, Used, etc.	M	S	
BR03.06		The system shall include a note field for information on lost or stolen medallions or for various other information.	M	S	
BR03.07		The system shall allow for the medallion inventory to be link to the Certificate Holder Asset List.	M	S	
BR03.08		The system shall generate the required medallion fees/invoices.	M	S	
BR03.09		The system shall accept certificate holder payment.	M	S	
BR03.10		The system shall capture date medallion was issued.	M	S	

BR03.11		The system shall allow for reconciliation of medallions by way Hand-held device on a annual basis.	M	S	
BR03.12		The system shall allow for central issuance of plates.	M	S	
BR03.13		The system shall make medallion information available to certificate holders via web portal (only available to the certificate holder it has been issued to)	M	S	
BR03.14		The system shall allow the validation of the status of the medallion by the future real-time tracking system.	M	S	
BR03.15		The system shall allow the use tracking of the medallion by the future real-time tracking system.	M	S	
BR03.16		The system shall allow for the uploading of medallion orders and other forms associated with medallions including Lost, Damaged or Stolen Medallion Notices, Medallion Invoices and Receipts with named links for easy		S	
BR03.17		The system shall provide for bar code (or similar) tracking and medallion management, allowing for real-time retrieval of medallion status and inventory purposes - maximum size	M	S + C + O	Barcode scanning on the mobile platform will require additional iOS / Android apps to work seamlessly with Salesforce.
BR03.18	**Medallion Turn-In**	The system shall allow for medallion turn-ins.	M	S	
BR03.19		The system shall allow for replacement medallion fee.	M	S	
BR03.20		The system shall allow any user, based on role/permission, to update the status of a medallion and require enter comments related to the update	M	S	

Medallion Specifications: For Informational Purposes Only				
Fields	Field Type	Comments	Mandatory Field	
Reports	Link or tab or button on main screen to open list of canned reports based on data obtained through the fields identified on Medallions Fields tab		Link	
New	Link or tab or button on main screen to open blank main screen of fields identified on Medallions Fields tab		Link	
Search	Link or tab or button on main screen to provide search of all data pieces in Medallion Inventory Module, including history, providing ability to search using partial, wild card, date range, by field title, etc.		Link	

Print	Link or tab or button on main screen to bring up print dialogue box		Link	
Back Arrow	Link or tab or button on main screen to move backwards one record		Link	
Forward Arrow	Link or tab or button on main screen to move forward one record		Link	
Medallion Use History	Link or tab or button on main screen to bring up chronological order, newest on top, of all successful and unsuccessful log ins by driver verifying status, providing if log in was successful or not, associated TA #, log in date & time, log out date & time, cab #,	This is future functionality for the Real-Time Tracking, for NRS 706.8825.4(d) The system must be capable of allowing, in a manner prescribed by the Taxicab Authority, a certificate holder to digitally associate a taxicab with a temporary or permanent medallion for the purpose of verifying the validity of a temporary or permanent medallion pursuant to NRS 706.88183	Link	
All field titles are to be links, that when selected, provide an immediate history of all entries in that field, by whom, and date and time of entry, chronologically, newest on top				
Medallion #	Alpha Numeric, 2-7 characters, do not allow for spaces in front or within, but allow for blanks after final character (ex. L1, L10, L100, DX190, CAB175), Alphas must display as capitals		Y	
Handicap Medallion Designation	Check Box, checked = yes, blank = no		N	
Medallion Type	Drop Down with values of REGULAR PERMANENT - 24/7; HANDICAP/SPECIAL		y	
Colors	Drop Down with values of RED W/BLACK LETTERING; WHITE W/BLUE LETTERING		Y	
Company	Drop Down with values of A-Cab; A NLV; ACE; Union; Vegas Western; Virgin Valley; Checker; Yellow; Star; Deluxe; Desert; Lucky; Nellis; Western; Whittlesea; Henderson		Y	
Date in Inventory	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App		Y	
Issued	Check Box, checked = yes, blank = no		N	
Date Issued	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App		C - Mandatory if Issued status is Y	
Issued To	Alpha, 20 characters		C - Mandatory if Issued status is Y	
Reason Issued	Drop Down with values of New Issue; Replace Lost; Replace Stolen; Replace Damaged; Cab Stolen		C - Mandatory if Issued status is Y	

Medallion Status	Values of Active or Inactive;	This is for immediate functionality; however, for future functionality for the Real-Time Tracking, for NRS 706.8825.4(d), when a driver logs into a device such as a meter, the driver will enter the medallion #. The device must in real-time verify the status of the medallion to determine if the attempted log in is valid and the medallion is "allowed" to be used.	Y	
Medallion Sub Status	Values of New or Not Issued; Damaged; Lost; Used		Y	
Use Status	Auto-fills the status of "in use", "available", "not available" - Defaults to "not available" for all medallion status choices except "Active"; When a medallion status is changed to "Active", the Use Status field changes to "available", if when a driver logs on with medallion status of "Active", auto-fills with "in use" blocking the medallion to be logged in from another device;	For immediately functionality, auto-fill "available" or "not available" as described further here -"In-use" is for future functionality for the Real-Time Tracking, for NRS 706.8825.4(d), when a driver logs into a device such as a meter, the driver will enter the medallion #. The device will verify the status of the medallion (as described in row 19) - the purpose is to ensure the medallion can not be logged into two machines	auto-fill	
Entered by	Names		Y	
Set	Drop Down with values of M1; M2; M3		Y	
Lost (L)	Check Box, checked = yes, blank = no		N	
Stolen (S)	Check Box, checked = yes, blank = no		N	
Damaged (D)	Check Box, checked = yes, blank = no		N	
Date Lost, Stolen or Damaged	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App		C - Mandatory if L S or D checked	
Time Lost, Stolen or Damaged	Numeric, HH:MM with Drop Down AM and PM, 12 hour clock		C - Mandatory if L S or D checked	
Date Reported	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App		C - Mandatory if L S or D checked	
Time Reported	Numeric, HH:MM with Drop Down AM and PM, 12 hour clock		C - Mandatory if L S or D checked	
Person Reporting	Alpha, 20 characters		C - Mandatory if L S or D checked	
All entries in the following Replacement (Temporary and Permanent) Medallion fields auto-update the master record of the specific medallion being updated when this is being filled out				
REPLACEMENT MEDALLION	2 parts: Part 1 - Link to auto-open Temporary Replacement Medallion page with fields identified in Medallion Fields Tab, Rows 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34; Part 2 - Main screen displays most current entries of rows 24, 25, 26, 27, 28, 29, 31, 32, 33; all data pieces may be written over but when written over, but all entries are saved in history			

Temporary Replacement Medallion #	Alpha-numeric, 7 characters		C - Mandatory if issuing temporary medallion	
Person Taking Report	Names		C - Mandatory if issuing temporary medallion	
Date Temporary Issued	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	When issued, auto-updates the Medallion Status (line 21), and Use Status (line 22) of the respective medallion	C - Mandatory if issuing temporary medallion	
Date Temporary Returned	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	When issued, auto-updates the Medallion Status (line 21), and Use Status (line 22) of the respective medallion	C - Mandatory if temporary issued	
Time Returned	Numeric, HH:MM with Drop Down AM and PM, 12 hour clock		C - Mandatory if Date Temporary Returned filled in	
Cab #	Numeric, 6 digits, do not allow for spaces in front or within, but allow for blanks after final digit (ex. 123, 1234)		N	
Temporary Replacement of medallion #	Alpha-numeric, 7 characters		C - Mandatory if issuing temporary medallion	
Permanent Replacement Medallion #	Alpha-numeric, 7 characters		C - Mandatory is issuing permanent replacement medallion	
Date of Final Transaction	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	When issued, auto-updates the Medallion Status (line 21), and Use Status (line 22) of the respective medallion	C-Mandatory if issuing permanent replacement medallion	
Time of Final Transaction	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App		C - Mandatory if Date of Final transaction filled in	
Permanent Replacement of Medallion #	Alpha-numeric, 7 characters		C - Mandatory if issuing permanent replacement medallion	
Comments	2 parts: Part 1 - On-screen "hyperlink" where dialogue box opens, and includes all prior comments for all activity with option to add a new comment. To read chronologically with newest on top, with the ability to click on individual entry to identify operator ID, date, time of entry; 2nd part - three to five of the most current lines of comments entered appear on main screen. Comments will not be able to be modified once saved.		Y	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR04 - Enforcement					
The TA is required by statute and regulation to hold hearings based on citations issued for violations of statute and regulations, and for other administrative actions against TA Permit					
The hearings may be requested when the TA is taking an action against a customer such as, but not limited to: TA Permit denial, suspension, and revocation; Administrative Fines, etc.					
The type of hearing is predicated on the action to be taken and data requirements may vary. The business requirements below have been generalized. The business requirements for the					
An individual or a business may request or be subject to a hearing.					
Citations may be issued under the jurisdiction of the TA Administrative Courts (at the Las Vegas TA office) or directly into Clark County Justice Court.					
Hearings conducted in the TA Administrative Courts are heard by an Administrative Attorney/Hearing Officer and are prosecuted by a Nevada Deputy Attorney General.					
Pre-trial hearings are conducted on Tuesdays and Thursdays. Trials are conducted on Wednesdays. All citations/violations are initially assigned a pre-trial date (Tuesday or Thursday) except					
A recipient of a citation written into the TA Administrative Court may "settle" or "take care of" a citation prior to the scheduled pre-trial date					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR04.01	**Citations**	The system shall provide a bidirectional interface and open API's for data passing from the Records Management System to mobile hand-held devices and from the mobile hand-held to the Records Management system. This interface will support the issuance of a citation by Agency Compliance Enforcement Investigators using a wireless handheld device.	M	S	Salesforce 1 on mobile devices (iOS & Android) seamlessly works with Salesforce on the desktop with similar functionality.
BR04.02		The system shall allow for the Taxicab Driver Permit module to auto-populate the hand-held citation screen once the Compliance Enforcement Investigator scans or enters The TA # of the Taxicab Driver. Data that will need to be available to the hand-held devices include but is not limited to: Name, Address, Taxicab Company, List of Outstanding citations, outstanding Admin Court dates, and Permit Status.	M	S	
BR04.03		The system shall allow for a calendar app with Admin Court Trial dates and times to be available on the hand-held device. Business Rules will be defined with the available dates and time of available Admin Court slots. This function needs to be fully configurable by TA Staff.	M	S	

BR04.04		The system shall allow the Compliance Enforcement Investigator to select the next available Admin Court Date and Time on the hand-held device and populate the citation screen on the hand-held device.	M	S	
BR04.05		The system shall allow the a Violations module containing the NRS violation number and description to be available on a wireless hand-held device for use by the hand-held device.	M	S	
BR04.06		The system shall allow for the capture of citation form and update of the Records management System Citation and Court modules with their appropriate updated data. The system shall allow for the capture of the electronic signature of the Taxicab Driver or person being cited and the citing investigator.	M	S + C + O	e-Signature will require custom development and an AppExchange product (e.g. eSignLive)
BR04.07		The system shall allow for the update of the Citation information to the Records Management System either in Real-time or when docked at the TA office or when a cellular signal strength permits.	M	S	
BR04.08	**Investigative Reports**	The system shall provide for a report writing module, providing a variety of law enforcement investigative report templates. Each written citation will require a report to be written and attached to the citation number file.	M	S	
BR04.09		The system shall allow the investigative reports to be written using desk-top, lap-top, and mobile apps by TA staff.	M	S	
BR04.10		The system shall associate law enforcement investigative reports to be associated with related records, i.e., event #, citation #, TA Permit #, taxicab #, investigator #, vehicle inspections, etc.	M	S	
BR04.11		The system shall move the reports through the approval cycle of a report, i.e., completed by investigator, approved or not approved by supervisor, inclusion into event # file, etc.	M	S	
BR04.12		The system shall provide an audit trail of all changes and actions of the investigative report.	M	S	
BR04.13		The system shall assign and follow record retention schedules for the investigative report (retention period does not begin until criteria is met).	M	S	

BR04.14		The system shall apply business rules to records retention.	M	S	
BR04.15	**Court Date Scheduler**	The system shall provide for a court date/time scheduler.	M	S	
BR04.16		The system shall allow the system administrator to assign new or additional business rules as needed .	M	S	
BR04.17		The system shall allow for the court date/time scheduler to have specific business rules based on violation type, i.e., 1st long haul violation will result in Tuesday or Thursday court date, if adjudicated guilty prior to a subsequent citation/violation for long haul. The actual fine amount will also be determined by these Business Rules.	M	S	
BR04.18		When a citation is written, when the violation(s) are selected, the system shall prompt for an adjudication history, and if the same violation has been adjudicated as guilty within the previous 12 months, the system will evaluate how many previous guilty adjudications and adjust court dates accordingly.	M	S	
BR04.19		When a citation is written and a violation on the citation is for long hauling, the system will query the database for any guilty adjudications within the previous 12 months for the same NRS. If one or more guilty adjudications in the previous 12 months is identified, the system shall mark the citation as mandatory court appearance.	M	S	
BR04.20		The system shall allow the calendar app (Court calendar) to stack add'l citations for the same court date, up until a pre-determined cut off time.	M	S	
BR04.21	**Wireless hand-held device technology**	The system shall allow for a calendar scheduling process that will populate the electronic citation court date field with the appropriate date/time of the hearing. The court date to be assigned will include multiple variables such as schedule of officer, quantity and types of hearings already scheduled, etc.	M	S	

BR04.22		The system shall allow defined business rules that can be modified by the system administrator based upon business requirements, i.e., 2nd long-haul violation requires mandatory court date of Wednesday while other violation types require a Tuesday or Thursday court date, even if the fine is paid	M	S	
BR04.23		The system shall allow for the populated court/date time to be manually over-written prior to final issuance of the citation.	M	S	
BR04.24		Once the citation has been issued/submitted through the hearings module, the system shall allow for it to be modified by a designee with supervisory permissions.	M	S	
BR04.25		The system shall generate a notification letter of the changes addressed to the subject of the citation for review, printing, signing and mailing by designated TA Staff.	M	S	
BR04.26		The system shall generate a notification of the changes addressed to the investigator who issued the citation.	M	S	
BR04.27		The system shall provide an audit trail of all changes and actions of the citation record.	M	S	
BR04.28		The system shall allow for the entry of a paper citation issued, creating the electronic record as the base for the remainder of the process.	M	S	
BR04.29		The system shall allow for scanning of all documentation to be tied to the citation record.	M	S + O	Scanning on mobile will require additional iOS apps.
BR04.30		The system shall attach the citation record to all related records, i.e., TA permit #, taxicab #, medallion #, etc.	M	S	
BR04.31		The system shall allow for the uploading of electronic citations to the database created as a result of this RFP, reducing/eliminating the need for data entry.	M	S	
BR04.32		The system will provide the hardware, software, and resources needed to implement an e-citation solution, which allows for future technology advancements.	M	S + O	Hardware component will have to be supplied by the TA. Salesforce will be used to connect and work with the relevant hardware

BR04.33		The wireless technology system shall extend different applications to each singular device; data will be allowed to be sent from each module to each device and data collected will be submitted from each device to its associated module	M	S	
BR04.34		The wireless technology system shall allow for easily entered data, allowing for auto-population in real-time, when a TA permit or taxicab is scanned (bar code type technology)	M	S	
BR04.35		The wireless technology system shall allow for compliance enforcement investigators to easily enter, read, change, modify data	M	S	
BR04.36		The wireless technology system shall connect to a printer mounted in an agency vehicle (but which can be removed) via Bluetooth or similar wireless technology, allowing for immediate printing.	M	S	
BR04.37		The wireless technology system shall allow for the real-time uploading of documents created directly into the database created as a result of this RFP.	M	S	
BR04.38		The wireless technology system must allow for TA specific business rules, changes in laws, and upgrades of the back-end system and the mobile devices.	M	S	
BR04.39		The wireless technology system must allow for use in rain, and varying levels of sunlight.	M	S	
BR04.40		The wireless technology system must provide an autofocus camera to capture pictures and associate the pictures with the citation.	M	S + C	Some custom development to capture the photos on the record
BR04.41		The wireless technology system printer shall provide convenient charging methods which have the ability to be mounted and removed from the agency vehicle.	M	O	Hardware component will have to be supplied by the TA. Salesforce will be used to connect and work with the relevant hardware
BR04.42		The wireless technology system shall provide an alternate printer solution for bicycle units (not mounted)	M	O	Hardware component will have to be supplied by the TA. Salesforce will be used to connect and work with the relevant hardware
BR04.43		The wireless technology system shall allow for user-friendly and intuitive interfaces on both the hand-held device and printer	M	S	Software will be Salesforce1 on the mobile device. Interface for hardware configuration will be handled by the hardware manufacturer

BR04.44		The wireless technology system shall provide built-in GPS.	M	S	
BR04.45		The wireless technology system shall submit all citations into the Hearings module as "incomplete" until supporting documentation is appended and the record is marked as "pending approval".	M	S	
BR04.46		Upon being marked as "pending approval", the system will post the citation into the Supervisory Compliance Enforcement workflow queue for approval.	M	S	
BR04.47		The system shall allow for the approval or denial of a citation by Supervisory role/permission	M	S	
BR04.48		The system shall move the citation through the hearings process when approved by the Enforcement Supervisor	M	S	
BR04.49		When an Enforcement Supervisor is denying the approval of a citation, the system will require comments by the Supervisor and will return the denied citation into the queue of the issuing investigator (this cycle will be repeated until approval by the Supervisor)	M	S	
BR04.50		The system shall provide for a dashboard tool for Supervisory Compliance Enforcement Officers to know which citations have not been submitted for approval and time-frames, etc.	M	S	
BR04.51		The system shall provide for a dashboard tool for the Chief Compliance Officer to know the status of all citations pending submission by the Compliance Enforcement Investigator, the status of all citations awaiting Supervisory approval, and providing the lapsed time since original citation issuance (or similar management tools)	M	S	
BR04.52		Upon approval by Supervisory Enforcement Investigator, the citation and supporting documentation will move into the Hearings Workflow Module.	M	S	
BR04.53	**Hearings**	The system shall provide a complete method to support the life cycle of all citations issued by the Taxicab Authority	M	S	
BR04.54		The system shall provide a method to capture the life cycle of a show-cause hearing	M	S	
BR04.55		The system shall assign a recommended fine amount based on business rules which will be provided	M	S	

BR04.56		The system shall allow for the assigned recommended fine amount to automatically adjust based on additional defined business rules.	M	S	
BR04.57		The system shall allow for manual modification of assigned recommended fine, and require justification in comments section (mandatory entry).	M	S	
BR04.58		The system shall allow for a separate entry of actual fine imposed/collected.	M	S	
BR04.59		The system shall allow attaching of associated various documents/forms in the citation history, using the citation # as the primary key for attachment.	M	S	
BR04.60		The system shall allow for manually scanned documents to be attached to the citation file.	M	S + O	Scanning on mobile will require additional iOS apps.
BR04.61		The system shall accept payment on a citation, in any approved tender, in person at TA office, via web portal, or via smart phone app.	M	S + C + O	Payment gateway support will be via an AppExchange product
BR04.62		The system shall apply payment to specified citation and "close out" the citation when the balance is zero.	M	S	
BR04.63		The system shall remove the citation from the court calendar when the citation is closed out (paid in full), and allow a future citation to be assigned the now-available court calendar slot, based upon business rules (time-frames).	M	S	
BR04.64		The system shall not make available for payment, any citation for which the fine has not yet been recommended.	M	S	
BR04.65		The system shall require payment in full for any citation being paid on the web portal.	M	S	
BR04.66		The system shall display defined fields when a driver accesses his/her citations through the Taxicab Driver's web portal and allow the driver to select any outstanding citations for payment.	M	S	
BR04.67		The system shall allow for issuance of payment plans when option selected by TA staff, and must follow business rules to be defined	M	S	
BR04.68		When a payment plan is in place, the system shall generate notice to the TA permit holder based upon his/her communication preference as a reminder when a payment is due	M	S	

BR04.69		The system shall "suspend" the TA permit when a payment is not made according to the payment plan.	M	S	
BR04.70		The system shall generate notice to the TA permit holder and the current employing taxicab company (may be different than the taxicab company on the citation) notifying of the suspension and reason.	M	S	
BR04.71		The system shall allow payment in full of outstanding fines in-person at TA office, via web portal, when permit status is "suspended", and re-instate in real time, as "active" if no other flags affect the status, such as expired or FTA, and shall generate a notice of the reinstatement (business rules will apply)	M	S	
BR04.72		The system shall maintain and display a history of all actions for each citation number.	M	S	
BR04.73		The system shall create a customer record if one does not exist.	M	S	
BR04.74	**FTAs (Failure to Appear)**	The system shall allow TA staff to manually notate a failure to appear for a court date/time	M	S	
BR04.75		The system shall change the TA Permit status to "Suspended FTA"	M	S	
BR04.76	**Suspensions**	The system shall allow TA staff to manually suspend a TA permit and assign a starting date and time, and ending date and time	M	S	
BR04.77		The system shall allow for the differentiation for cause of suspension	M	S	
BR04.78		The system shall allow for hierarchy of suspension causes - applying business rules	M	S	
BR04.79	**Hearings - Court Attendance**	The system shall generate a court calendar of all scheduled actions to be heard	M	S	
BR04.80		The system shall capture customer information such as, but not limited to: Customer name, contact information, physical address, mailing address, telephone number, email address etc.	M	S	
BR04.81		The system shall capture hearing reason.	M	S	
BR04.82		The system shall capture all citation information.	M	S	
BR04.83		The system shall capture associated law-enforcement agency information such as, but not limited to: Agency information, officer information, officer badge information, address, contact information, etc.	M	S	

BR04.84		The system shall capture attorney information such as, but not limited to: Attorney company name, representing attorney, address, contact information etc.	M	S	
BR04.85		The system shall allow for comments to be added to hearing records.	M	S	
BR04.86		The system shall allow for scanning of all documentation to be tied to the customer record.	M	S	
BR04.87	**Evidence**	The system shall provide a method to document, track, and dispose of all evidence in accordance with International Association of Property and Evidence (IAPE) standards	M	S	
BR04.88		The system shall provide a method to attach evidence records to all associated records, i.e., bar code or similar technology	M	S	All related records will be associated with each other via identifiers (e.g. ID numbers, etc)
BR04.89		The system shall allow designation of evidence as blood and allow manual entry of DUI blood test information such as, but not limited to: Blood Alcohol Content (BAC).	M	S	
BR04.90		The system shall generate notice to TA staff (to be identified) when blood evidence will be sent out for processing.	M	S	
BR04.91		The system shall capture inventory storage location such as, but not limited to: Aisle, row, rack, shelf, etc. (evidence)	M	S	
BR04.92		The system shall create bar-code labels such as, but not limited to: inventory labels, location labels, etc. (evidence)	M	S	
BR04.93		The system shall interface with a bar-code reader for all transaction processing. (evidence)	M	S + C + O	Barcode reading and decoding on the mobile device will require additional software on the handheld (iOS and Android)
BR04.94	**Hearings**	The system shall allow for the notation that a bond is required.	M	S	
BR04.95		The system shall capture Bond company information such as, but not limited to: Bond company name, bond number, amount, effective date, etc.	M	S	

BR04.96		The system shall capture bond adjuster information such as, but not limited to: Adjustor name, Contact information, physical address, mailing address, contact information, attorney representing bond company, attorney contact information, etc.	M	S	
BR04.97		The system shall capture audio recording requests.	M	S	
BR04.98		The system shall capture discovery requests.	M	S	
BR04.99		The system shall allow for inquiries and selection of DMV customer records.	M	S	
BR04.100		The system shall allow the ability to capture and tie all scanned information the customer hearing record.	M	S	
BR04.101		The system shall allow for adding, changing, updating, deleting hearing information.	M	S	
BR04.102		The system shall allow hearing scheduling.	M	S	
BR04.103		The system shall generate hearing letters to customers.	M	S	
BR04.104		The system shall retain all historical records of all hearings with all recorded information.	M	S	
BR04.105		The system shall allow TA staff to search for hearings using one or more search criteria.	M	S	
BR04.106		The system shall allow hearing records to be retrieved along with all supporting documentation.	M	S	
BR04.107	**Update Hearing Request**	The system shall allow the ability to retrieve hearing information such as, but not limited to: Hearing information, attorney information, court information, law enforcement information, permit review, compliance enforcement, bond information, etc.	M	S	
BR04.108		The system shall allow the staff to update hearing status.	M	S	
BR04.109		The system shall notify TA staff about additional actions to be taken such as, but not limited to: review for suspension, fraud, etc.	M	S	
BR04.110		The system shall allow a technician to reassign hearing dates.	M	S	
BR04.111	**Schedule Hearing Appointment**	The system shall allow a hearing to be scheduled and tied to the customer record.	M	S	
BR04.112		The system shall allow for scheduling information to be established such as, but not limited to: Date, Time, location, Additional comments, etc.	M	S	

BR04.113		The system shall provide a calendar with time slots identifying them as opened, filled, blocked, etc.	M	S	
BR04.114		The system shall allow for administrative hearing officers to be assigned to hearing calendars.	M	S	
BR04.115		The system shall allow for compliance enforcement investigators to be assigned to hearing calendars.	M	S	
BR04.116		The system shall allow for continuances to be scheduled.	M	S	
BR04.117		The system shall capture any 'no-show' parties such as but not limited to: law officers, attorneys, etc.	M	S	
BR04.118		The system shall provide access through the driver portal for drivers to review their scheduled hearings.	M	S	
BR04.119		The system shall easily interact with each associated module.	M	S	
BR04.120		The system shall allow updates to courts information such as, but not limited to: address, phone number, web address references, etc.	M	S	
BR04.121		The system shall provide hearing scheduled information on external platforms, such as, but not limited to: driver portal, smart phone app, etc.	M	S	
BR04.122	**Reschedule Hearing**	The system shall allow the ability to reschedule hearings by TA staff (only), and capture required information such as but not limited to: reason for reschedule, comments, reason for denials, etc.	M	S	
BR04.123		The system shall allow TA staff to reschedule previous hearings.	M	S	
BR04.124		The system shall allow TA staff to reschedule future hearings for the same case.	M	S	
BR04.125		The system shall tie all additional hearings scheduled to original case.	M	S	
BR04.126	**Calendar Updates**	The system shall provide the ability for users to block specific calendar day(s) on the hearing appointments calendar for administrative purposes. The user shall have the optional ability to enter specific reasons while blocking calendar day(s).	M	S	

BR04.127		The system shall have the ability to display a list of dates and time slots available for users to reschedule a hearing. Any hearing appointment time slots must be adjustable. There is only one hearing officer, so only one hearing can be scheduled for any one time.	M	S	
BR04.128		The system shall have the ability to display the list of dates and time slots that are available for TA Staff to select in order to reschedule a hearing. The user may indicate the amount time (hours/minutes) for each hearing.	M	S	
BR04.129		The system shall automatically update the calendar when a hearing is scheduled.	M	S	
BR04.130		The system shall allow the user to update an individual's existing appointment to reference multiple hearings in the same time slot. In cases where more than one hearing has been indicated in a single session (time slot) the system shall maintain the combined appointment session time. In addition, each hearing will be shall be unique and each shall require that a final disposition be entered.	M	S	
BR04.131	**Hold hearings**	The system shall allow the ability to capture all attending parties scheduled to attend a hearing.	M	S	
BR04.132		The system shall allow the ability to capture all no-shows at a scheduled hearing.	M	S	
BR04.133		The system shall allow the ability to capture hearing start/end times.	M	S	
BR04.134		The system shall allow the ability to capture attorney information representing customer at a scheduled hearing.	M	S	
BR04.135		The system shall allow the ability to capture information for the law enforcement officer attending a scheduled hearing.	M	S	
BR04.136		The system shall allow the ability to capture administrative hearing officer presiding over the case and deputy attorney general prosecuting the case.	M	S	
BR04.137	**Update Hearing Disposition**	The system shall allow the ability to enter final hearing disposition.	M	S	
BR04.138		The system shall generate forms/notices before, during, and after hearings at the request of TA staff (to be defined).	M	S	

BR04.139		They system shall allow the ability to upload and tie files to the hearing record. The files shall include file types such as, but are not limited to: audio, video, data, documents, etc.	M	S	
BR04.140		The system shall allow for purging of files based on State's retention schedule.	M	S	
BR04.141		The system shall update the status to closed upon completion of final disposition.	M	S	
BR04.142		The system shall allow for updates if the case is submitted to a district or justice court for further proceedings after a hearing is held and disposition made.	M	S	
BR04.143		The system shall allow the ability to impose varying progressive sanction and fees for citations/violations based upon guilty adjudication.	M	S	
BR04.144	**Subpoenas**	The system shall allow for the creation, inquiry, changes, and deletions of a Subpoena Requests.	M	S	
BR04.145		The system shall capture subpoena information such as, but not limited to: Subpoena date, received date, subject, requested information, etc.	M	S	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR05 - VEHICLE INSPECTIONS					
Taxicab companies, prior to placing a taxicab into service, must submit a request to the TA for inspection for that taxicab to ensure it meets requirements in NRS and NAC. The TA conducts these inspections prior to it being allowed to be placed into service.					
The TA conducts inspections on taxicabs quarterly, prior to operation in passenger service, when there is an outstanding 24-hour or out-of-service notice, when there is an accident or complaint regarding mechanical malfunctions, when a taxicab has been converted to propane, and when a taxicab has been "wrapped".					
Taxicabs have a maximum life, defined in months, that they are able to be used as taxicabs in Clark County. Time-frames are defined by whether the cab is "new" or "used" (defined by NRS 482.076.3, a new vehicle is placed into service with 2500 miles or less), and whether it is a "hybrid electric vehicle", as defined in 40 C.F.R. § 86.1702-99.					
The TA is looking to the vendor to provide a mobile application that will allow an investigator or inspector to retrieve vehicle data from the TA RMS in this RFP and to capture/submit and print the on-site vehicle inspection information on a wireless mobile device, as part of the solution to this RFP.					
The TA inspects many vehicle types and models. The captured information should be easily selected, verified, and uploaded to the customer's vehicle record.					
Taxicab Inspections					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desire**	**Vendor Response**	**Vendor Response Explanation**
BR05.01	**Vehicle Description Records**	The system shall allow for the creation, inquiry, changes, and deletions of taxicabs.	M	S	
BR05.02		The system shall allow for status such as, but not limited to: Active, OSN, 24, Removed From Service, Pending, etc.	M	S	
BR05.03		The system shall capture vehicle information such as, but not limited to: Taxicab Company, Taxicab number, vehicle identification number, make, model, year, Fuel type, License Number, Taxi Meter Number, Handicap, Hybrid, In service date, in service mileage, Date out of service,	M	S	
BR05.04		The system shall link cab information to	M	S	
BR05.05		The system shall retrieve previous and current vehicle inspection information	M	S	
BR05.06	**Inspections**	The system shall provide an application that allows the Vehicle Inspector to utilize an alternate device to capture the vehicle information.	M	S	Alternate device will be software running on mobile phones
BR05.07		The system shall link the captured inspection information to the vehicle record in real-time, allowing for the immediately removal from service or place back into	M	S	

BR05.08		The system shall allow the application to upload captured information to the Vehicle Inspectors technician computer upon connectivity.	M	S	
BR05.09		The system shall allow for the scanning of the VIN barcode by a hand-held device to retrieve vehicle records and auto-populate inspection screen fields or web enabled	M	S + C + O	Barcode reading and decoding will be done with external software on handheld devices
BR05.10		The system shall integrate with the records management system to retrieve vehicle information for all vehicle inspections.	M	S	
BR05.11	**Regular Vehicle**	The system shall allow for the creation, inquiry, changes, and deletions of vehicle inspections.	M	S	
BR05.12		The system shall capture vehicle information such as, but not limited to: Vehicle Identification Number, make, model, year, body type, etc.	M	S	
BR05.13		The system shall create a new vehicle records using vehicle VIN.	M	S	
BR05.14		The system shall link the vehicle to the Certificate Holder record.	M	S	
BR05.15		The system shall capture odometer reading.	M	S	
BR05.16		The system shall capture the Taxicab company representative signature on	M	S	
		The system shall move the taxicab record to history when the taxicab has been removed from service and a new cab of the same cab # record is created (will allow only one active record of each cab #, but multiple inactive records of each cab #)	M	S	
BR05.17	**New Cab**	The system shall capture fuel type indicators such as, but not limited to: Gas, propane, hybrid, electric, other, additional (as required by statute or regulation), etc.	M	S	
BR05.18		The system shall capture the authorized vehicle inspector information such as, but not limited to: name, date of signature, etc.	M	S	
BR05.19		The system shall capture authorized vehicle inspector signatures electronically on any inspection forms as required.	M	S	
BR05.20		The system shall capture external assisting agency information.	M	S	

BR05.21	**VDR**	The system shall capture vehicle inspection information such as, but not limited to: Cab #, Event #, VDR #, Employee Issuing, Notice type (Other, OSN, 24-Hour), Reason for Inspection (Accident, Complaint, Inspection, Meter Seal, Other), Incident Location, New Cab designation, Driver Permit #, Driver Cited designation, Check Engine Light On designation, Date Issued, Time Issued, Meter #, Seal #, Date Cleared, Employee Clearing (from agency employee list).	M	S	
BR05.22		The system shall provide for the use of pre-formatted forms on wireless hand-held devices for investigators/inspectors to fill in when conducting inspections	M	S	
BR05.23		The system shall capture the cab company's signature electronically.	M	S	
BR05.24		The system shall capture vehicle information such as, but not limited to: Vehicle identification number, license plate, make, model, year, zip code, etc.	M	S	
BR05.25		The system shall allow an inquiry on the vehicle such as, but not limited to: vehicle identification, license plate, etc.	M	S	
BR05.26		The system shall retrieve vehicle	M	S	
BR05.27		The system shall retrieve vehicle registration information.	M	S	
BR05.28		The system shall calculate required testing.	M	S	
BR05.29		The system shall generate a unique Vehicle inspection report number.	M	S	
BR05.30		The system shall generate Out-of-Service and 24-hour notices to include elements such as, but not limited to: Vehicle identification number, license plate, make,	M	S	
BR05.31		The system shall assign a scheduled "remove from service" date on any taxicab upon entry into the system, based upon parameters which will be provided.	M	S	
BR05.32		The system shall allow a taxicab to manually be removed from service, and require a date and reason entry	M	S	
BR05.33		The system shall link vehicle inspection report to taxicab records.	M	S	

BR05.34		The system shall generate a unique Vehicle inspection report number.	M	S	
BR05.35		The system shall link vehicle inspection report to vehicle account.	M	S	
BR05.36		The system shall allow for creation, inquiry, changes, and modify VDR numbers.	M	S	
BR05.37		The system shall allow for VIR Reprints.	M	S	
BR05.38		The system shall allow creation, and inquiry, of VIR reports.	M	S	
BR05.39		The system shall allow printing of VDR	M	S	
BR05.40		The system shall allow a vehicle inspector to edit all pre-filled fields	M	S	
BR05.41		The system shall allow a record to be re-printed	M	S	
BR05.42		The system shall allow a vehicle inspector to "accept" the submitted new taxicab record upon inspection when the inspection is passed, resulting in the addition of the taxicab to the inventory	M	S	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR06 - Dispatch/Call Management/Events					
Public complaints are currently received via email, telephone, fax, in person, and through the existing Taxicab Authority website where there is a form to fill out and when "submit" is selected, an email is					
Taxicab companies are mandated to report complaints of violations of applicable statutes by drivers to the TA. Cab Companies currently report complaints either by submitting a web form on the TA website					
Complaints received by the TA are either "actionable" or "inactionable". "Inactionable" complaints are customer service complaints, not violations of applicable statutes or regulations. "Actionable" complaints					
TA staff monitoring complaints have the functionality to route a customer to other staff, supervisors or sections, or the respective cab company representatives based on complaint content.					
When TA staff monitoring complaints determines a complaint is "Actionable", it is routed to a TA Enforcement Investigator to conduct an investigation.					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR06.01	**Complaints**	The system shall allow for TA staff to enter customer "complaint" information in the system and assign an 'event' number or other tracking identifier..	M	S	
BR06.02		The system shall allow for TA staff to classify the complaint as "actionable" or "non-actionable".	M	S	
BR06.03		The system shall allow for TA staff to input a disposition code to a "non-actionable" complaint such as "referred to cab company", "not enough information", or the like, closing the complaint entry for no further action required.	M	S	
BR06.04		The system shall allow for TA staff to assign an "actionable" event to other TA staff.	M	S	
BR06.05		The system shall allow for TA staff to "close" the complaint, based upon permissions, upon receiving the closing disposition from the assigned investigator.	M	S	
BR06.06		The system shall allow for the re-assignment of a complaint to a different investigator by supervisory or Dispatch/Call Management personnel, based upon permissions.	M	S	
BR06.07		The system shall allow for any TA staff to update the complaint information with actions taken, people involved, etc., to resolve the complaint.	M	S	
BR06.08		The system shall provide a method for monitoring outstanding complaints with their details to include the creation date and due date (if assigned).	M	S	
BR06.09		The system shall allow supervisory staff to review and assign activities, and due dates.	M	S	

BR06.10		The system shall allow supervisor monitoring tools, such as a dashboard, displaying each subordinate investigator's outstanding assignments/events, sorted by type and date, oldest at top, newest on bottom, and shall receive some type of notification if a creation date is older than a determined time frame; last updated field; ability to see all activity that has been completed, etc.	M	S	
BR06.11		The system must provide the ability to report the % of written complaints resolved within 30 days	M	S	
BR06.12		The system must provide an audit trail of all actions taken on each complaint.	M	S	
BR06.13		The system shall tie the "complaint" information to the TA permit #, taxicab #, and/or the cab company name, when included in the record.	M	S	
BR06.14		The system shall capture information on the "complaint" record such as, but not limited to: Date, Time, etc. (Refer to specifications)	M	S	
BR06.15		The system shall allow the "complaint" to be forwarded to a taxicab company if required.	M	S	
BR06.16		The system shall allow the "complaint" to be escalated to a supervisor after a specified period of no action.	M	S	
BR06.17		The system shall allow TA Staff to view all applicable policies and procedures per transaction processed.	M	S	
BR06.18		The Dispatch/Call Management system shall provide an entry screen of all 'events' with fields to be identified.	M	S	
BR06.19		The Dispatch/Call Management system shall provide a method to create and view incidents, assign enforcement personnel, and monitor the progress of each incident from receipt to completion for a single jurisdiction.	M	S	
BR06.20		The Dispatch/Call Management system shall direct the flow of enforcement personnel and monitor the progress of each call from receipt to completion for a single jurisdiction.	M	S	
BR06.21		The system shall provide user-definable features and customizable screens, mouse, and keyboard functionality with keystroke shortcut commands to quickly add, modify, assign, and complete calls.	M	S	

BR06.22		The system shall append event numbers to associated database tables related to that event, i.e., if TA Permit # 123 is listed in an event, that event # appends to TA Permit # 123's history.	M	S	
BR06.23		The system shall allow the TA Staff to see all documentation, correspondence, transaction history and all event interactions for a specific TA Permit Holder, taxicab, or medallion, and certificate holder.	M	S	
BR06.24		The system shall allow cut and paste functionality within the transaction records.	M	S	
BR06.25		The system shall allow TA Staff searches such as, but not limited to: Soundex, Wildcard, exact spelling, etc.	M	S	Standard Salesforce global search is very robust and can bring in relevant results for the User
BR06.26		The system shall allow the Dispatch Supervisor shadow the Dispatch/Call Management desktop input screen to observe activities or transactions.	M	S	
BR06.27		The system shall allow the remote shadowing functionality to be used as a training tool.	M	O	Remote shadowning can be enabled on the desktop via standard screensharing supported by various apps like WebEx, Join.me, etc.
BR06.28		The system shall allow database table historical searches to be initiated using a from-date and to-date. Only transactions within the specified period will be available to the Dispatch/Call Management.	M	S	
BR06.29		The system shall prevent certain transactions from being saved without data entered into mandatory fields.	M	S	
BR06.30		The system shall follow security requirements for all computer inactivity time-out displays.	M	S	
BR06.31		The system shall allow an audit query that will report the number of times an employee has accessed a TA Driver's record.	M	S	
BR06.32		The system shall allow for real-time access to automated instruction guides to be made available to Dispatch/Call Management staff.	M	S	
BR06.33		The system shall allow for log notes to be entered without the creation of an event.	M	S	
BR06.34		The system shall allow for comments to be created and tied to event or log notes	M	S	
BR06.35		The system shall allow for auditing of event entries and transactions initiated by Dispatch/Call Management staff.	M	S	

BR06.36		The system shall provide the ability to view all individual driver status and history information in single screen.	M	S	
BR06.37		The system shall provide the ability to synchronize data across all TA system fields. For example a TA Permit suspended in one screen must reflect suspended on all screens.	M	S	
BR06.38		The system shall allow a Dispatch/Call Management staff to review all customer correspondence.	M	S	
BR06.39		The system shall allow for metrics and analytics to be captured for a technician.	M	S	
BR06.40	**Receive Customer Email**	The system shall provide a central email inbox using taxicomplaints@state.nv.us.	M	S	
BR06.41		The system shall provide the ability to tie all email correspondence to a record but not require it.	M	S	
BR06.42		The system shall provide the ability to carbon copy the inbox when a reply is sent to a customer.	M	S	
BR06.43		The system will provide statistics on total number of emails received and allow for an event # to be assigned to track how many emails resulted in an event #.	M	S	
BR06.44	**Record Review**	The system shall provide the ability to review events in real-time.	M	S	
BR06.45		The system shall have the ability to provide the Dispatch/Call Management staff to inquiry and update access to those areas defined to complete their specified duties.	M	S	
BR06.46		The system shall allow a Dispatch/Call Management staff to have the same system functionality in any environment such as, but not limited to: Test, System Test, User Acceptance, Production, etc.	M	S	
BR06.47	**Hearings/Court Scheduling**	**The system shall allow the Dispatch/Call Management to schedule, cancel or change a court date.**	M	S	
BR06.48	**Reporting**	The system shall provide reports as defined in the enterprise reports requirements.	M	S	
BR06.49		The system shall provide reports of time spent on events by Dispatch/Call Management Staff.	M	S	
BR06.50	**Dispatch/Call Management**	The system shall allow inquiry access of TA Permit Holders and CPCN Holders	M	S	
BR06.51		The system shall allow inquiry of the citations/hearings database.	M	S	
BR06.52		The system shall provide a method to track and coordinate officers	M	S	

BR06.53		The system shall provide for the documentation of pertinent information provided by investigators and vehicle inspectors to include call details, log notes, and dispositions of calls.	M	S	
BR06.54		The system shall provide for the fields necessary to record all pertinent information from callers.		S	
BR06.55		The system shall capture pertinent information related to the status of investigators, events, etc.	M	S	
BR06.56		The system shall provide for a method to assign priority levels to active calls/events.	M	S	
BR06.57		The system shall provide for the classification of call types at initial receipt, and track the reclassification as initial and final call-type.	M	S	
BR06.58		The system shall capture the source of the event, i.e., witness, victim, suspect, TA Investigator, other law enforcement agency, etc., as the initiator of the event.	M	S	
BR06.59		The system shall allow for additional TA investigators or other resources to be assigned to an event	M	S	
BR06.60		The system shall provide for the capture of the status of an event, i.e., open, closed, suspended, pending, etc., and shall require a disposition when being closed.	M	S	
BR06.61		The system shall provide for the entry of vehicle information of vehicles impounded, with associated records and supporting documentation, and "holds" placed on the vehicle, searchable by all fields.	M	S	
BR06.62		The system shall provide Dispatch/Call Management Staff with a Dashboard to include Active calls and tasks.	M	S	
BR06.63	**Radio Communications**	The system shall allow for Event ID's to be assigned by Dispatch to various TA functions such as, but not limited to: complaint tracking, telephone call tracking where a TA action is required, radio communications with field investagators and vehicle inspectors. If the solution selected by the TA has it's own means of tracking the above the term events is not mandatory. The critical part is tracking of the above mentioned items.		S	
BR06.64		The system shall allow for the creation, inquiry, changes, suspension, and closure of event management entries.		S	
BR06.65		The system shall keep history information on all actions completed in the system.		S	

BR06.66		The system shall keep historical information on all actions completed.		S	
BR06.67		The system shall keep audit logs on all actions completed.		S	
BR06.68		The system shall allow for incomplete entries received to be created and saved in the system		**S**	
BR06.69		The system shall allow for an event status of but not limited to: Open, close, reopened, hold, assigned, reassigned, research, etc.		**S**	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR02 - Certificate Holders					
The Taxicab Authority issues Certificates of Public Convenience and Necessity to taxicab companies meeting application and background requirements to provide taxicab service in Clark County, NV					
There are currently sixteen (16) authorized taxicab companies (Certificate Holders) under nine (9) ownership groups in Clark County, NV, regulated by the Taxicab Authority.					
Certificated taxicab companies are required to maintain certain financial standards, county business license, and Nevada Secretary of State business licenses, each of which must be auditable.					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR02.01	**Certificate Holder**	The system shall allow for a table by certificate holder (taxicab company)	**M**	**S**	
BR02.02		The system shall allow for the creation, inquiry, and changes of certificate holders and status	**M**	S	
BR02.03		The system shall allow for the uploading of supporting documentation	**M**	S	
BR02.04		The system shall allow for the creation of a master list by certificate holder as a table for vehicles, medallions, permits, events, records, etc.	**M**	S	
BR02.05		The system shall allow for a status of the certificate, i.e., application only , pending background, pending Board approval, denied, appealed, revoked, suspended, active, inactive, transfer pending, etc.	**M**	S	
BR02.06		The system shall allow creation, inquiry, and changes of SOS Common Business data retrieved by TA staff	**M**	S	
BR02.07		The system shall allow creation, inquiry, and changes of Clark County business license data retrieved by TA staff	**M**	S	
BR02.08		The system shall capture business corporate information such as, but not limited to: Legal business name, contact information, etc., DBA business name, business structure types, mailing and physical address, business phone and fax numbers, email address, FEIN number, corporation status, filing effective date, Nevada Secretary of State business license number, etc.	**M**	S	
BR02.09		The system shall capture business principal information such as, but not limited to: Individual name, address, contact information, background check, etc.	**M**	S	
BR02.10		The system shall capture business insurance information.	**M**	S	
BR02.11		The system shall generate user defined Certificate of Public Convenience and Necessity using modifiable template	**M**	S	
BR02.12		The system shall link the taxicab number record to the Certificate Holder and the VIN.	**M**	S	
BR02.13		The system shall allow uploaded documents to be associated with one or multiple certificate holder files	**M**	S	
BR02.14		The system shall capture CPCN number and sub number, and assign the next sequential sub number when changes are made to actual certificate	**M**	S	

BR02.15		The system shall capture the amount of medallions allocated to a certificate holder according to the CPCN, and will maintain historical records for additional medallions issued	**M**	S	
BR02.16		The system shall allow for scanning and uploading of submitted certificate holder documents, i.e., interventions, pleadings, insurance documentation, etc.	**M**	S	
BR02.17	**Ownership Group**	the system shall allow for a table by ownership group	**M**	S	
BR02.18		The system shall allow for the update of user defined fields for one entry to populate all companies within an ownership group when entry is designated as such	**M**	S	
BR02.19		the system shall allow for the relationship to associate a certificate holder to an ownership group	**M**	S	
BR02.20		The system shall allow for the creation, inquiry, and changes of ownership groups and status	**M**	S	
BR02.21		The system shall allow for the uploading of supporting documentation	**M**	S	
BR02.22		The system shall capture business principal information such as, but not limited to: Individual name, address, contact information, background check, etc.	**M**	S	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422
BR07 - Web Portal
The TA would like a public facing web portal function for applicants and Taxicab Drivers to submit their initial Taxicab Driver Application as well as Renewal Applications using this web portal as a
The Second Phase of the web portal will be a web portal for taxicab companies (Certificate Holders). After logging in using a unique ID by parent group (9) and password by User ID, there would be a
Prior to beginning or changing employment as a taxicab driver for a certificate holder, a taxicab driver must present a referral slip from his or her new employer for issuance of the permit. The vision

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired	Vendor Response	Vendor Response Explanation
BR07.01	**New Applicant - Phase 1**	The system shall allow Taxicab Driver's and Taxicab Driver Permit applicants to register on the Taxicab Driver web portal. A new applicant will use his/her Nevada Drivers License # as his/her User ID and a strong password. An Active Taxicab Driver will use his TA # as his User ID with a strong password of his/her choice to create an account.	M	S	Salesforce Community Cloud license is required
		The system shall verify that the entered Nevada driver's license number has not been used as the user ID in the New Applicant process to ensure duplicate accounts are not created.	M	S	
BR07.02		The system shall allow a registered user to logon to the Taxi Driver's portal to begin the Permit application process or the Permit Renewal process.	M	S	
BR07.03		The system shall allow for a User who signs with a Nevada Drivers License as the User ID to be presented with a New Applicant input screen. A TA # entered as a User ID will be presented with a Taxicab Driver Permit Renewal input screen.	M	S	
BR07.04		The system shall present the signed-on applicant the standard fields from the current Taxicab Driver's Permit application form including the Criminal History Statement, Child Support Questionnaire, Authorization for Release of Information, and the Fingerprint Background Waiver form. A field for Communication Preference: with the following options E-Mail, Text, Cell Phone and Home Phone should be included as a mandatory field.	M	S	
BR07.05		The system shall provide for an Electronic signature acceptance process on the web portal		S + C + O	eSignatures will be handled by a separate AppExchange product (e.g. eSignLive)
BR07.06		The system must allow for the uploading of scanned Taxicab Driver Permit required forms (Taxicab Company Referral, DOT Medical Form) prompting the applicant for each required form during the upload process.		S + O	Scanning on the mobile device will require Salesforce1

BR07.07		The system shall append the Nevada Drivers License # of the signed-on User to the uploaded Taxicab Driver Referral Form and the DOT Medical form along with the Document type. Ex: xxxxxxxxxx_Referral, xxxxxxxxxx_Medical.	M	S	
BR07.08		The system shall upon submission of a completed application, assigning a "pending" status to the application and route the application to the 'Permit Input Queue' for review if the applicant selected 'No" to all Criminal Background Questions . A printable or e-mail confirmation of the successful submission will be available for the applicant.	M	S	
BR07.09		The system shall route any New Applicant request to the Administrative Office workflow queue if the applicant selected 'YES' to any Criminal History Background question.	M	S	
BR07.10		The system shall follow all state security policies and procedures for website access and user password policies, including resetting passwords.	M	S	
BR07.11		The system shall provide a self-service password reset function.	M	S	
BR07.12	**Renewal Application - Phase 1**	The system shall allow User ID sign-on using a TA # and strong password will be presented with the Taxicab Driver's Permit Renewal Form option. If the Application date is outside of the 30 day renewal period the renewal applicant will be presented with a message indicating the date of the 30 day renewal period. If the application date is after the TA Permit Expiration date the renewal applicant will be presented with a message indicating the Permit is Expired and a New Taxicab Driver Application is required.	M	S	
BR07.13		The system shall present the signed-on applicant the standard fields from the current Taxicab Driver's Permit application form including the Criminal History Statement, Child Support Questionnaire, Authorization for Release of Information, and the Fingerprint Background Waiver form. A field for Communication Preference: with the following options E-Mail, Text, Cell Phone and Home Phone should be included as a mandatory field.	M	S	
BR07.14		Once a TA Permit # is issued, the driver may use the TA # as the user ID in place of the driver's license number, maintaining the associated records.	M	S	
BR07.15		The system shall allow TA staff to review and modify the application packet, applying an audit trail.	M	S	

BR07.16		Upon entering the TA Permit #, the TA Permit # now becomes the primary key for all future transactions.	M	S	
BR07.17		All supplemental documents and actions noted during the application process follow the driver's TA Permit # for historical purposes	M	S	
BR07.18	**Payment Processing - Phase 1**	The system shall allow a logged-in applicant or renewal driver to pay the oustanding fee for his/her application.	M	S	
BR07.19	**Reporting - Phase 1**	The system shall allow reporting of: workflow process statistics, accepted & rejected applications, applications started but not completed, testing, etc.	M	S	
BR07.20	**Fine Payment History Processing - Phase 2**	The system shall allow a logged in driver to view all previously paid and outstanding fines, fees, etc.		S	
BR07.21		The system shall allow a logged in driver to select an outstanding fine/fee and submit secure payment.		S	
BR07.22		The system shall allow a logged in driver to view all active payment plans (those with outstanding balances) and submit secure payment.	M	S	
BR07.23		All payments submitted online shall generate a confirmation and itemized receipt, both of which are able to be printed in PDF format or send to their requested communication method.	M	S	
BR07.24		The system shall allow a logged in driver to select a past, current, or outstanding citation to see all citation content including date and time of scheduled court date	M	S	
			M		
BR07.25	**Certificate Holder Web Portal - Phase 2**	The system shall provide a Certificate Holder web Portal to allow Certificate Holders to register and create individual user id's for access to their portal.	M	S	
BR07.26		The system shall allow each Certificate Holder portal to include their specific asset inventory such as Drivers, Taxicab Vehicles and Taxicab Medallions.	M	S	
BR07.27		The system shall allow for Taxicab Driver Permit New Applicant and Taxicab Driver's Permit Renewal process to be available from their specific portal.	M	S	
BR07.28		The system shall provide a company specific Taxicab Company Referral web form to be completed and attached to a New Taxicab Driver's Permit Application once the New Application and Referral apps have been rolled out to the Certificate Holders web portal. This process shall follow the already established application submission process.	M	S	
BR07.29		The system shall provide online help functionality and content for the web portal functions.	M	S	

BR07.30		The system shall provide the ability to submit a "terminated driver" which must also update the status in licensing/permitting in real time, requiring explanation, with a error report sent to submitter if all field information does not agree to database record	M	S	
BR07.31		The system must provide the ability to submit new cab to be inspected and repaired cab to be inspected to get added onto the "to be inspected" report	M	S	
BR07.32		The system shall include web-based payment option for all citation/fine transactions; and payment option for annual medallion fees (web invoice)	M	S + C + O	Payment gateway integration via an AppExchange product.
BR07.33		Train and provide technical support to Taxicab Authority staff on portal use and management.	M	S	
BR07.34		The system shall allow a logged in Certificate Holder to view all outstanding medallion invoices and submit secure payment.	M	S + C + O	Payment gateway integration via an AppExchange product.
BR07.35	**Certificate Holder - Inspections - Phase 2**	The system shall allow a logged in certificate Holder to submit new taxicab record information	M	S	
BR07.36		The system shall allow a logged in certificate holder to schedule a new taxicab, wrapped taxicab, or propane converted taxicab for initial inspection	M	S	
BR07.37		The system shall allow a logged in certificate holder to schedule a re-inspection of any taxicab placed out of service or having a 24-hour notice	M	S	
BR07.38	**Certificate Holder - Citations - Phase 2**	The system shall allow a logged in driver to select a past, current, or outstanding citation to see all citation content including date and time of scheduled court date	M	S	
BR07.39		The system shall allow a logged in Certificate Holder to run a pre-set query of drivers adjudicated guilty of long route violation employed by that certificate holder at the time of violation (not adjudication).	M	S	
BR07.40		The system shall allow a logged in certificate holder to run a pre-set query of drivers adjudicated guilty of long route violation for all certificate holders, without providing the certificate holder name.	M	S	
BR07.41	**Miscellaneous**	The system shall provide a secure web portal page for the Taxicab Authority Board members to download confidential document downloads	M	S	

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR08 - REPORTS MANAGEMENT SYSTEM					
The TA currently has reports created by disparate systems and processes with no comprehensive report management system. Reports are created manually, systematically, programmatically, from Access database applications and the Licensing COTS application.					
In all cases, date and parameter queries are required for report generation.					
The current reports have limited search functionality; making research cumbersome. The Access reports are exported into Excel for data manipulation and are only compatible with a specific version of Access (2007).					
The TA is seeking a comprehensive reporting management system or engine that will allow reports to be generated from any data element available in the proposed system. The data elements are the lowest levels of reporting available.					
System reporting shall consist of all data extracted from the system such as, but not limited to: reports, correspondence, function documentation, receipts, notices, exceptions, statistics, modeling, analytics, forecasting, fiscal management, controlled documents, product documentation, logging, etc.					
This RFP does not describe every report required to be created. The TA is looking for the vendor system to include a report management system that shall allow any report to be created as required for this project based on any and all data. This reporting engine should allow TA Staff to create all reports with no 'coding' or SQL knowledge, user training on the report engine should provide the knowledge to create any report as long as the data elements are available.					
The reporting engine should provide all reporting functionality to all modules (i.e., licensing, driver training, inspections, investigations, dispatch, medallions, courts, performance indicators, audits, complaints, invoicing, payments, etc.).					
The reporting engine shall include the generation of all current reports being generated through existing agency technologies					
Requirement ID					
BR08.01	Reporting Engine Capability	The system shall allow for the creation, inquiry, changes, and deletions of system generated reports.	M	**S**	
BR08.02		The system shall allow the creation of reports of the lowest data element within the TA system. Such as any TA related data element.	M	**S**	
BR08.03		The system shall allow reporting roll-up to highest data level such as, but not limited to: Customer, function, transactions, etc.	M	**S**	
BR08.04		The vendor shall provide User training on the systems reports engine to allow TA Staff to create any report based on available data elements.	M	**S**	
BR08.05		The system shall allow a simple user-defined report tool for creation of ad-hoc reports.	M	**S**	Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All our standard reports are "templates" so they can be used
BR08.06		The vendor shall provide user training to include creating Monthly Agency reports and ad-hoc reports both detail and summary formats with drill-down capabilities.	M	**S**	
BR08.07		The system shall allow date range functionality as well as frequency reporting such as Monthly, Quarterly, semi-Annually, and Annually.	M	**S**	
BR08.08		The system shall allow reports to be scheduled to be run on specific days and specific times or as reoccurring tasks as defined by TA staff.	M	**S**	
BR08.09		The system shall generate reports as "Read only" with drill down capability.	M	**S**	
BR08.10		The system shall generate system audit reports on each functional module, workflow process, and staff statistics .	M	**S**	
BR08.11		The system shall allow report print and export destinations such as, but not limited to: Printer, screen, file, download, etc.	M	**S**	
BR08.12		The system shall provide report format such as, but not limited to: Standard reports, excel, Word, Adobe PDF, CSV, comma delimited, etc.	M	**S**	
BR08.13		The system shall allow for electronic delivery of reports.	M	**S**	
BR08.14		The system shall allow reports to be available to various users such as, but not limited to: Internal staff, driver and taxicab company portal etc.	M	**S**	

BR08.15		The system shall include online reporting functionality and allow reports to be directed to specific web portals. (Certificate Holders portal)		**S**	
BR08.16		The vendor shall train TA Staff to create statistical reports, pre-set and ad hoc.	M	**S**	
BR08.17		The system shall allow reports to be available in any internal file structure such as, but not limited to: TA Web portal	M	**S**	
BR08.18		The system shall allow data elements from separate multiple data field content to be generated into a single transaction reporting i.e., permitting with citations, court dates, events etc.	M	**S**	
BR08.19		The system shall integrate data from multiple sources.	M	**S**	
BR08.20		The system shall integrate data for multiple uses. i.e. Warehouse reporting.	M	**S**	
BR08.21		The system shall generate headers and footers on reports generated.	M	**S**	
BR08.22		The system shall generate page numbers on reports generated.	M	**S**	
BR08.23		The system shall capture date and time stamp of reports generated.	M	**S**	
BR08.24		The system shall generate a unique report identifier number.	M	**S**	
BR08.25		The system shall allow reports creation in function such as, but not limited to: Batch, online, real-time, ad-hoc, etc.	M	**S**	
BR08.26		The system shall allow batched reports to be stored and remain static.	M	**S**	
BR08.27		The system shall generate employee statistical reports such as, but not limited to: work days, work time, work schedule calendar, employee leave information, number of processed transactions by employee, number of permit new/renewal applications received/ processed/abandoned, average processing times, actual processing times, tasks assigned, etc.	M	**S**	
BR08.28		The system shall generate customer account reports such as, but not limited to: customers based on permit status, number of expired/revoked/suspended permits, number of issued, appeared, settled, outstanding, failures to appear citations, number of all status types of medallions, number of all status types of taxicabs, etc.	M	**S**	
BR08.29		The system shall generate a report of any mass data element changes.	M	**S**	
BR08.30		The system shall generate transaction statistical reports such as, but not limited to: Processed transactions, completed transactions, transactions with errors, number of records accessed by TA staff, etc.	M	**S**	
BR08.31		The system shall generate exemption reports.	M	**S**	
BR08.32		The system shall generate transmittal reports.	M	**S**	
BR08.33		The system shall generate complaint statistical reports from the dispatch to include, but not limited to: number actionable vs inactionable complaints, number of closed complaints, days to close complaints, etc.	M	**S**	
BR08.34		The system shall allow for the generation of renewal detail reports to include, but not limited to counts of renewals, method of renewal (online, website), other preset categories, etc.	M	**S**	
BR08.35		The system shall allow for the generation reports of TA permits surrendered.	M	**S**	

BR08.36		The system shall allow for the generation of customer driver history reports.	M	**S**	
BR08.37		The system shall allow for the generation of vehicle report to include, but not limited to: Number of gas vehicles, number of alternate fuel vehicles, etc.	M	**S**	
BR08.38		The system shall allow for the generation of case management/event reports.	M	**S**	
BR08.39		The system shall allow for the generation of inspector reports.	M	**S**	
BR08.40		The system shall allow the setting of pre-set reports to print to a specific printer as scheduled.	M	**S**	
BR08.41		The system shall provide the ability to disable pre-set reports from running or printing or both (allowing for manual selection and printing)	M	**S**	
BR08.42		The system shall meet the State's report retention timelines for all stored reports within the system..	M	**S**	
BR08.43	**Reporting Retention**	The system shall purge reports meeting retention end-dates after notification to agency Records Manager and approval.	M	**S**	
BR08.44		The system shall backup all created reports to storage.	M	**S**	
BR08.45		The system reporting and information that becomes obsolete and no longer used must be disposed of by appropriate procedures. The application and associated information must be either preserved, discarded or destroyed in accordance with Electronic Record and Record Management requirements defined in NRS and NAC 239, Records	M	**S**	
BR08.46		The system shall allow generation of multiple reports for all TA requirements in this RFP.	M	**S**	
BR08.47		The system shall generate driver training class reports.	M	**S**	
BR08.48		The system shall allow for the creation, inquiry, changes, and deletions of customer correspondence templates.	M	**S**	
BR08.49	**Customer Correspondence**	The system shall allow for the generation of customer correspondence from predefined templates.	M	**S**	
BR08.50		The system allow for the generation of customer correspondence for all TA requirements in this RFP.	M	**S**	
BR08.51		The system shall allow for printing the unique TA # information on correspondence when available.	M	**S**	
BR08.52		The system shall allow for the creation, inquiry, changes, and voids of fiscal management reports.	M	**S**	
BR08.53	**Fiscal Management**	The system shall allow for reporting drill down to data element level such as, but not limited to: General ledger, State account codes, etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.54		The system shall allow reporting roll-up to highest data level such as, but not limited to: Customer (TA #), product, financial transactions, , TA Staff, payment source, payment type, payment reason, etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.55		The system shall allow for the generation all reconciliation reports.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.56		The system shall allow for the generation of all general ledger balancing reports.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.57		The system shall for the generation of reports to include, but not limited to: Transactions, definition, GL links, counts, amounts, etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.58		The system shall allow for the generation of reports to include but not limited to: outstanding fines with due dates; paid fines; outstanding and paid medallion invoices; payment plans - paid, scheduled, and outstanding; etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management

BR08.59		The system shall allow for the generation of KPI fiscal year collection reports.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.60		The system shall allow for the generation of fiscal forecasting and trend analysis reports.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.61		The system shall allow for the generation of reports to include, but not limited to: actions taken, payment plan reporting, outstanding fines, etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.62		The system shall allow for the generation of revenue recovery account reports such as, but not limited to: Delinquent payments, number of accounts, amount, revenue collected, account fees, collections, etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.63		The system shall allow for the generation of a statistical cash bond report to include, but not limited to: license number, license status, bond cancellation date, bond amount, region, etc.	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.64		The system must allow for the ability to report the % of written complaints resolved within 30 days	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management
BR08.65		The system shall provide the ability to assign standard reports to user groups or individual users, based on role or job function	M	**S + C + O**	Fiscal management will require additional software on the AppExchange. E.g. FinancialForce for all fiscal management

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BR09 - Interfaces
The TA will be required to interface with external business partners to fulfill the statutory requirements of a computerized real-time tracking system. The solution for this Records Management System Modernization RFP is necessary to support the future requirements defined here:
The use of hand-held devices for e-citation and vehicle inspection functions will require data from the Records Management System to the hand-held platform selected by the TA. The Records Management System must provide a bi-directional interface or Interfaces and open API's for any hand-held platform solution choosen by the TA.
Additional interfaces may be required, based on legislative action, during the implementation of the vendor's proposed system.
The TA will be required to work with each business partner for interface testing.
Some interfaces are currently being developed and are included. However, the definition of these interfaces has not been completed. The TA expects that these interfaces will be included and supported by the vendor's application.
The TA expects the Records Management vendor to provide the hand-held solution vendor with all interface and open API documentation required for the hand-held solution provider to sussessfully exchange inquery data and update data with the Records Management System by the RMS vendor.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired (F)future	Vendor Response	Vendor Response Explanation
BR09.01	**Interfaces**	The system shall interface with future business partners using the prescribed transport modes.	F	S	Connecting Salesforce to an existing enterprise application is a common and frequently performed task. Integration options range from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms.
BR09.02		The system shall support various transport protocols such as, but not limited to: Web Services, Secure File Transport Protocol (SFTP), File Transport Protocol (FTP), UNI,	F	S	Robust API's Salesforce Force.com Platform provides programmatic access to the TA's information using simple, powerful, and secure application programming interfaces. Central to the ability to integrate and extend Salesforce is the powerful and modern Web Services API. Architected around the latest standards, including SOAP, WSDL and WS-
BR09.03		The system shall support secure transport protocols such as, but not limited to: HTTPS, SFTP, Certificates, Password access, Access ID protocols, etc.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.04		The system shall support real-time interface processing.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.05		The system shall support batch file interface processing.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.06		The system shall support web-services interface processing.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.07		The TA currently has no existing file layouts for interfaces.	F	S	We can develop integration specific specification via standard technologies like REST/SOAP.
BR09.08		The system shall be upgraded to latest interface releases if applicable.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.09		The system shall interface with future business partner interfaces for required verifications.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.10		The system shall create all interfaces required by the TA in Development, test, user acceptance testing, training, and	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.11		The vendor shall ensure seamless integration of future TA interfaces.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.12		The system shall be sufficiently flexible to easily add, modify or delete interface fields such as but not limited to: data elements, display messages, payment architecture etc.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.13		The system shall include testing with the TA business partners in the interface implementation plan.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.

BR09.14		The system shall generate all required interface responses.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.15		The system shall apply all required edits prior to processing any business partner	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure
BR09.16		The system shall interface with new business partners to fulfill future requirements in support of the Real-Time Tracking System as defined in NRS 706.88183, NRS 706.8825,	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.17		The data exchange between the vendor's proposed system and TA's business partners must ensure secure and encrypted protocols where applicable.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.18		The vendor shall provide specification documentation for all interfaces incorporated into the vendor's proposed	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.19		The interface documentation must provide instructions for connectivity and communication with the vendor's proposed system.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.20		The vendor shall test all required network connections of proposed interfaces that become active.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.21		The vendor shall describe what interfaces exists in the proposed system that would be used to meet the requirements of this RFP.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.22		The vendor shall describe what types of interfaces are possible with the proposed system such as, but not limited to: Real-Time, Batch, Web-service, centralized messaging, etc.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.23		The system shall generate "trip numbers" or similar tracking identifier to all trips through the meter, and append those trip numbers to the associated TA Permit #, medallion #, taxicab #, citation #, event #, etc.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure connections.
BR09.24		Open interface for future use - real time tracking, other state agencies, etc.	F	S	All the features marked (F) for the future are currently supported by Salesforce very well. We can develop these today and have the connectivity primed for any future integration with external partners via secure

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BR10 - Technology

The TA currently uses disparate tools for IT management. Lack of integration, slow response time, and unsupported software, are also features of the current TA environment.

The TA is platform agnostic and therefore is looking for the best in class. All vendor solutions shall be reviewed and scored according to how well they meet the requirements of this RFP.

The TA may continue to use the State's backbone for all network connectivity, however an increase in bandwidth may be required to meet response time metrics. The current network bandwidth capacity utilizes Century Link's Metro Ethernet Solution.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired	Vendor Response	Vendor Response Explanation
BR10.01	Vendor IT Requirements	The vendor shall provide training and transfer of knowledge of all configurable and technical system components to TA resources.	M	S	Free on-demand training on a wide range of topics is provided through the Salesforce application Help & Training. Customer Success Community Customer Success offers many resources and tools to get started, including the Customer Resource Center (success.salesforce.com) with online Help, Learning Center and Communities, where you can tap into training videos, a knowledgebase, or reach out to other customers for best practices. Ongoing success monitoring is a key part of Customer Success. Salesforce's cloud computing model enables us to monitor usage data, to determine whether customers are getting the most from their subscription. We share this information with customers through Personal Account Reviews and Success Scorecards, along with actionable recommendations for improvement. Customer Success offers programs to help customers roll out new features or products, with training and adoption toolkits, to ensure our customers' business benefit is always growing, and that they remain customers for life. Trailhead: the Free, Fun Way to Learn Salesforce Everyone can learn Salesforce. Whether you are an admin, user or developer, there is a learning trail for you. Customers can sign up for a free Developer edition account and take advantage of the fun and free interactive learning curriculum provided at Salesforce Trailhead (https://developer.salesforce.com/trailhead). Users can pick specific trails, modules or projects based on role (admin, user, etc), experience level (beginner, intermediate, advanced), products (Service Cloud, App Cloud, etc) or topics (App Logic, CRM, Data Management, etc) to learn new skills and absorb the information they need quickly. - Trails - there are over 65 trails to choose from that provide guided learning paths through modules and projects and help users cover the most ground in the shortest amount of time. They provide users a game plan for exploring new skills. Trails include Admin Beginner, Admin Intermediate, Developer Beginner, Develop
BR10.02		The vendor shall provide documentation for all delivered functionality in this RFP.	M	S	Salesforce provides release notes with every upgrade which highlight new functionality. Current and past release notes can be found here: https://releasenotes.docs.salesforce.com/en-us/summer17/release-notes/salesforce_release_notes.htm
BR10.03	Applications	The system shall include web enabled functionality for all business functions.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
BR10.04		The system shall include standardized formats for all activities such as, but not limited to: Creation, change, updates, deletes, etc.	M	S	
BR10.05		The system shall allow for data element correction in all system modules such as, but not limited to: Development, test, user acceptance, training, production, etc.	M	S	Salesforce offers many features to ensure the capture of effective and relevant customer data. The system offers features such as validation rules with red-highlighted error messages, administrator-defined field picklists, and field default values. You can also leverage required fields that are denoted with a red bar to the left of the field entry. Non-editable fields are greyed out (or populated with data in "read-only" mode). For fields that require additional information, administrators can add help text to fields that will pop up when a user "rolls over" a question mark icon next to the field.

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BR11 - Conversion					
The core system of record for the current TA licensing application LicenseEase (COTS) resides in an Oracle database on a Windows based virtual machine in Carson City. The core system of record for all other TA Access					
The following data volume estimates by source type are:					
The TA will provide (Extract) the metadata that describes the data, relationships, access to the data source that may reside in a database and/or flat files, and record count statistical information. The TA will provide data					
The TA Permit number field was originally defined as a four digit field but is now currently six digits. This should be expanded in the new system to nine digits, with zeros preceding the actual number to complete the nine					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR11.01	**TA System Data Conversion**	The vendor shall provide a proposed conversion plan (for a phased implementation) to include the following: Phase 1 (LicenceEase (COTS), Medallions), Phase 2 (Events, Vehicles and Hearing Access Databases).	M	S	
BR11.02		The vendor shall clearly define roles and responsibility for participants in the conversion process.	M	S	
BR11.03		The vendor shall validate record counts of data records converted/loaded into any Test environment.	M	S	
BR11.04		The vendor shall identify data integrity issues and propose a Resolution plan for resolving the data integrity issues.	M	S	
BR11.05		The vendor shall provide data mapping of existing TA data elements to corresponding vendor's system data elements.	M	S	
BR11.06		The vendor shall provide a data mapping business requirement document that will define the extraction, transformation, and data loads.	M	S	
BR11.07		The vendor shall provide a data mapping technical requirement document that will define technical processes, systems, files, data elements, jobs, etc. for the extraction, transformation, and data loads.	M	S	
BR11.08		The vendor shall work with the TA to ensure all data elements are correctly mapped by field type, data element, and data element definitions during each conversion processes.	M	S	
BR11.09		The vendor shall work with the TA to ensure all documented requirements are approved and signed by both the TA and vendor.	M	S	
BR11.10		The vendor shall load the transformed data files into the correct database(s) and/or structure defined by the vendor's proposed system.	M	S	
BR11.11		The vendor shall provide various reports, statistics, and metrics during the data transformation processes.	M	S	
BR11.12		The vendor shall provide various reports, statistics, and metrics during the data load processes.	M	S	
BR11.13		The vendor shall validate all data loaded to ensure data integrity.	M	S	
BR11.14		The vendor shall validate all data is loaded. All exceptions will be reported to TA project staff and corrected by vendor prior to reloading of data.	M	S	

BR11.15		The vendor shall provide an process to transfer/migrate data from proposed vendor's test system to the non-production environments for User Acceptance testing.	M	S	
BR11.16		The vendor shall validate data transferred/migrated from each enviroment defined.	M	S	
BR11.17		The vendor will work with the TA project personnel to address all issues and exceptions encountered to ensure a successful data load into the vendor's proposed	M	S	
BR11.18		The vendor shall provide project timelines for the conversion process to include dress rehearsals, extraction, loads, and proposed production execution.	M	S	
BR11.19		The vendor shall work the TA to plan the conversion strategy and ensure the strategy meets the business	M	S	
BR11.20		The TA plans to use a phased implementation approach with each phase migration to production and go-live occuring once the Phase has passed User Acceeptance. The vendor shall provide a phased implementation plan that will include the above senerio.	M	S	
BR11.21	**Data Cleansing**	For Taxicab/Inspection records, when there is an OSN or 24 Hour Notice Status, if the cab has been "removed from service", the OSN or 24 hour notice must show as cleared through removal from service - data cleansing	M	S	
BR11.22		For TA permit records, those that are expired greater than three years will not need to be converted unless there is an outstanding fine.	M	S	

BR10.06	**Testing Tools**	The vendor shall provide testing tools for the proposed technology and be made available in all modules such as, but not limited to: Development, test, user acceptance, training, production, etc.	D	S	Salesforce offers both a Production environment and 4 different types of Sandbox environments. This gives you the ability to create multiple copies of your organization in separate environments for a variety of purposes, such as testing and training, without compromising the data and applications in your Salesforce production organization. The usage of the various Salesforce Sandbox types during an implementation varies, but below will provide you with a description and common use of each type of environment: Developer Sandbox Developer sandboxes are designed for a single developer and intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). Developer sandboxes have a storage limit to 200 MB of data and 200 MB of files, which is enough for many development and testing tasks. You can refresh a Developer sandbox once per day. Developer Pro Sandbox Developer Pro sandboxes are intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). They have a larger storage limit than Developer sandboxes, up to 1 GB of data and 1 GB of files. The larger limit allows for more robust test data sets and enables this environment to handle more development and quality assurance tasks. You can refresh a Developer Pro sandbox once per day. Partial Copy Sandbox Partial Copy sandbox environments include all of your organization's configuration (metadata) and a subset of your production data that you define by using a sandbox template. Use Partial Copy sandboxes for virtually any development, testing, or training purpose. The only tasks for which they aren't well-suited are full performance and load testing. Additionally, as defined by your sandbox template, Partial Copy sandboxes can include your organization's standard and custom object records, documents, and attachments up to 5 GB of data and 5 GB of
BR10.07	**Systems**	The system shall provide a unified technology base to include a solid framework.		S	Our proposed SaaS solution is built on the Salesforce Platform and includes all needed infrastructure, which is fully hosted, managed, and maintained by Salesforce. Salesforce only requires a computer that can run a web browser and an Internet connection or a mobile device. No other software or hardware is required. Salesforce applications are delivered on-demand over the Internet, so the TA will not need to worry about licensing software or setting up and managing hardware platforms. Salesforce Force.com is a modern Platform as a Service (PaaS) that's built for cloud computing, with multitenancy inherent in its design. To meet the high demands of its large user population, Force.com's foundation is a metadata-driven software architecture that enables multi-tenant applications. Force.com combines several different persistence technologies, including a custom-designed relational database schema, which are innately designed for clouds and multitenancy—no virtualization required. Force.com's core technology uses a runtime engine that materializes all application data from metadata—data about the data itself. In Force.com's well-defined metadata-driven architecture, there is a clear separation of the compiled runtime database engine (kernel), tenant data, and the metadata that describes each application. These distinct boundaries make it possible to independently update the system kernel and tenant-specific applications and schemas, with virtually no risk of one affecting the others. Every logical database object that Force.com exposes is internally managed using metadata. Objects, (tables in traditional relational database parlance), fields, stored procedures, and database triggers are all abstract constructs that exist merely as metadata in Force.com's Universal Data Dictionary (UDD). For example, when you define a new application object or write some procedural code, Force.com does not create an actual table in a database or compile any code. Instead, Force.com simply stores metadata that the system's engine can use to generate the virtual application components at runtime. When you need to modify or customize something about the application schema, like modify an existing field in an object, all that's required is a simple non-blocking update to the corresponding metadata.

BR10.08		The system shall provide access to a database standardized query language reporting process with the ability for users to create report without vendor or query language knowledge.	M	S	The Salesforce solution includes a powerful suite of analytics and reporting tools to help you view and analyze your data that can be accessed via the web or mobile device in real-time. Salesforce also offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All our standard reports are "templates" so they can be used as report starting points from which users can alter fields, criteria, etc. and use the "Save As" function to easily capture a version more specific to their unique needs. Users can also create new custom reports to access exactly the information they need by using the intuitive, wizard-driven Report Builder. There is no need for IT support or advanced scripting capabilities to run reports. View a short (3:16) video on how to use the Report Builder in Salesforce: https://www.youtube.com/watch?v=7_LkmrhKf2g
BR10.09		The system shall provide software configuration management tools for updating workflow processes and business rules without vendor intervention.	M	S	Ease of use is one of the most important factors in ensuring broad adoption of the solution and organizational utility. To achieve the highest value from the solution investment, the TA can customize the Salesforce solution to best fit its user's needs. The Salesforce Force.com cloud platform offers tools for "no compromise customizations," to make it possible to create both fast and easy configuration, as well as deep customizations to meet just about any need. The TA can easily customize the Salesforce application through clicks or code methodology. Salesforce configuration, development, and administration is focused 80% on clicks vs. 20% code, dramatically improving cost of ownership and enabling non-technical business users to easily extend existing Salesforce functionality and/or create entirely new applications that run in the Salesforce framework. Through the point-and-click methodology, custom fields, custom objects and new applications are easily configured in Salesforce. All customizations are stored as metadata and interpreted at runtime allowing the core code to be upgraded while guaranteeing that customizations will work across upgrades. Below are some of the more typical customizations made by users: - Customizable User Interface. Salesforce enables the TA to build user interfaces that match its brand, look and feel, and the exact behavior you need and can be done through our declarative development tools (point and click, drag and drop). Users can further augment their individual view through the same point and click process so that they get a solution that is personal, and fits their work style. - Customizable Workflow. The TA will have the ability to set up workflow with simple clicks. Automate common operations such as tasks, alerts, data population, outbound XML messages and more without IT support or code. - Customizable Objects and Fields. New fields, objects, and applications are easily configured in Salesforce. Our point and click, drag and drop methodology enables the TA to easily extend existing Salesforce functionality and/or create entirely new applications that run in the Salesforce framework. - Customization of Reports. The Salesforce solution includes a powerful suite of analytics and reporting tools to help you view and analyze your data that can be accessed via the web or mobile device in real-time. Customizing
BR10.10		The system shall provide tools and documentation for all system backup and recovery processes.	M	S	Disaster Recovery Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned at an archive data center. Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Backups are retained for 90 days. Backups never physically leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.

BR10.11		The system shall provide a high ailability system to meet the demands and requirements of this RFP.	M	S	Salesforce has maintained high levels of availability across all Salesforce instances since inception. As the only on-demand vendor to provide daily service-quality data on a public Web site (http://trust.salesforce.com), Salesforce proves that we are the leader in availability. And by making its track record completely transparent, Salesforce proves we are worthy of our customers' trust. To ensure maximum uptime and continuous availability, Salesforce provides the best redundant data protection and most advanced facilities protection available, along with a complete data recovery plan—all without affecting performance. Salesforce uses commercially reasonable efforts to make its on-demand services available to its customers 24/7, except for planned downtime, for which Salesforce gives customers prior notice, and force majeure events. Excellent availability statistics are critical to Salesforce's customers' success and to the success of Salesforce as a company. Live and historical statistics on the Salesforce system performance are publicly published at https://trust.salesforce.com/en/#systemStatus. The persistence layer underlying Salesforce Platform is proven database technology that powers all of Salesforce's products today, serving more than 150,000 organizations and over 4 billion transactions per day with an average request response time of less than 250 milliseconds, all with an average uptime of 99.9+ percent.
BR10.12		The vendor shall estimate required storage requirements based on transaction projections.	M	S	
BR10.13		The system shall support virtualization of required storage and system components.	M	S	Force.com combines several different persistence technologies, including a custom-designed relational database schema, which are innately designed for clouds and multitenancy—no virtualization is required.
BR10.14	**System Monitoring**	The system shall provide automated notification of all system functions such as, but not limited to: System failures, critical job alerts, outages, encountered errors, etc.	M	S	Salesforce monitors databases internally and offers a wide range of other monitoring tools to customers. Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you'll find: • Live and historical data on system performance • Up-to-the minute information on planned maintenance • Phishing, malicious software, and social engineering threats • Best security practices for your organization • Information on how we safeguard your data In addition to the Salesforce Trust site (trust.salesforce.com) to monitor uptime and performance, the TA will also have access to a System Overview, which will help you monitor performance and usage of your own Salesforce org. This overview includes: • Schema - # and % of custom objects and data storage • API Usage - # and % of requests in the last 24 hours • Business Logic - # and % of Rules, Apex triggers and classes, as well as % of code used • User Interface - # and % of custom apps, published Site.com sites, active Force.com sites, active flows, custom tabs and Visualforce pages • Most Used Licenses - the top three used licenses for your organization • Portal Roles - # and % for total Partner Portal, Customer Portal and Communities roles Health Check lets the TA understand and proactively remediate your Salesforce org's security risks and vulnerabilities from a single page. At a glance, the TA can see and fix security risks for your org in your Session Settings, Password Policies, and Network Access settings. A health check dashboard shows how well your org measures against the Salesforce-recommended baseline.

BR10.15		The system shall provide database monitoring tools.	M	S	Salesforce monitors databases internally and offers a wide range of other monitoring tools to customers. Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you'll find: • Live and historical data on system performance • Up-to-the minute information on planned maintenance • Phishing, malicious software, and social engineering threats • Best security practices for your organization • Information on how we safeguard your data In addition to the Salesforce Trust site (trust.salesforce.com) to monitor uptime and performance, the TA will also have access to a System Overview, which will help you monitor performance and usage of your own Salesforce org. This overview includes: • Schema - # and % of custom objects and data storage • API Usage - # and % of requests in the last 24 hours • Business Logic - # and % of Rules, Apex triggers and classes, as well as % of code used • User Interface - # and % of custom apps, published Site.com sites, active Force.com sites, active flows, custom tabs and Visualforce pages • Most Used Licenses - the top three used licenses for your organization • Portal Roles - # and % for total Partner Portal, Customer Portal and Communities roles Health Check lets the TA understand and proactively remediate your Salesforce org's security risks and vulnerabilities from a single page. At a glance, the TA can see and fix security risks for your org in your Session Settings, Password Policies, and Network Access settings. A health check dashboard shows how well your org measures against the Salesforce-recommended baseline.
BR10.16		The system shall provide real-time system review and monitoring.	M	S	Please see our response to BR10.15 above.
BR10.17		The system shall provide error notification functionality for all applications or modules such as, but not limited to: Workflow Processing and Missed Scheduled jobs, etc.	M	S	Validation rules along with custom error messages can be created by TA.
BR10.18		The system shall capture, store, and log all system log events.	M	S	Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and auditing features that provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include: - Record Modification Fields - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information. - Login History - You can review a list of successful and failed login attempts to your organization for the past six months within Salesforce. The TA can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary. - Field History Tracking - You can also enable auditing for individual fields, which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing. - Setup Audit Trail - Administrators can also view a Setup Audit Trail for the past six months within Salesforce, which logs when modifications are made to your organization's configuration. This trail can be downloaded into Excel or as a csv file. While the Login History and Setup Audit Trail are available for six months within Salesforce, audit trails can be downloaded and stored locally to meet longer audit log retention requirements. Detailed application logs can be used for forensics investigations by customers. These logs are stored for 12
BR10.19		The system shall provide the log functionality such as, but not limited to: create, inquiry, reporting, etc.	M	S	Please see our response to BR10.19 above.

BR10.20	**Workflow Control**	The system shall provide the ability to create, modify, test and remove workflow controls.	M	S	Workflow management and process enactment are core strengths and foundational services of the Salesforce Platform that enable customers to easily automate business processes and operate more efficiently using point-and-click. Processes can be simple tasks - such as creating an activity, emailing an alert, updating a data field, or posting a message to a chatter feed - or more complex – such as sending data to external or third party systems and applications via an integration message, creating new records and updating existing related records, launching other processes/flows, submitting records for approval, and more. The Salesforce Lightning Process Builder, together with workflow rules, actions and approvals enable you to rapidly design and run any business process in the cloud without infrastructure, software, or code. The Process Builder's simple and powerful design allows you to create your processes by using a convenient visual layout with point-and-click efficiency. For every business rule or system event a customer needs to enact, one or more actions can be defined for execution when the specified conditions are met. These actions are created using point-and-click visual editors by a system administrator or business analyst and do not require complex procedural source code. Processes and workflow rules support several different types of actions. Salesforce Process and Workflow Actions: •Create a Record – Creates a new record (Account, Contact, Case, Event, etc.) in the system and sets the desired values in the new record's data fields. For example, in a 311 system, when a case's status changes to "Field Service Required", automatically create a new Work Order record, assign it to a technician and set a target completion date. •Update a Record / Field Updates – Updates a field within the record for which the rule was created or a related record. Values can be set specifically, or can be calculated using related records and built in functions within the formula editor. In a Safety Tracking application, for example, when the status is changed to ""Investigate Incident"" the record could be automatically reassigned to the Safety Investigator and safety related fields could be auto-populated.
BR10.21		The system shall provide an auditable, logged, and controlled data correction functionality.	M	S	Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and auditing features that provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include: - Record Modification Fields - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information. - Login History - You can review a list of successful and failed login attempts to your organization for the past six months within Salesforce. The TA can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary. - Field History Tracking - You can also enable auditing for individual fields, which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing. - Setup Audit Trail - Administrators can also view a Setup Audit Trail for the past six months within Salesforce, which logs when modifications are made to your organization's configuration. This trail can be downloaded into Excel or as a csv file. While the Login History and Setup Audit Trail are available for six months within Salesforce, audit trails can be downloaded and stored locally to meet longer audit log retention requirements. Detailed application logs can be used for forensics investigations by customers. These logs are stored for 12

BR10.22		The system shall generate automated notification of workflow changes.	M	S	Workflow management and process enactment are core strengths and foundational services of the Salesforce Platform that enable customers to easily automate business processes and operate more efficiently using point-and-click. Processes can be simple tasks - such as creating an activity, emailing an alert, updating a data field, or posting a message to a chatter feed - or more complex – such as sending data to external or third party systems and applications via an integration message, creating new records and updating existing related records, launching other processes/flows, submitting records for approval, and more. The Salesforce Lightning Process Builder, together with workflow rules, actions and approvals enable you to rapidly design and run any business process in the cloud without infrastructure, software, or code. The Process Builder's simple and powerful design allows you to create your processes by using a convenient visual layout with point-and-click efficiency. For every business rule or system event a customer needs to enact, one or more actions can be defined for execution when the specified conditions are met. These actions are created using point-and-click visual editors by a system administrator or business analyst and do not require complex procedural source code. Processes and workflow rules support several different types of actions. Salesforce Process and Workflow Actions: •Create a Record – Creates a new record (Account, Contact, Case, Event, etc.) in the system and sets the desired values in the new record's data fields. For example, in a 311 system, when a case's status changes to "Field Service Required", automatically create a new Work Order record, assign it to a technician and set a target completion date. •Update a Record / Field Updates – Updates a field within the record for which the rule was created or a related record. Values can be set specifically, or can be calculated using related records and built in functions within the formula editor. In a Safety Tracking application, for example, when the status is changed to ""Investigate Incident"" the record could be automatically reassigned to the Safety Investigator and safety related fields could be auto-populated.
BR10.23		The system shall capture and execute actions based on workflow life cycle such as, but not limited to: Edits, updates, changes, etc.	M	S	Workflow management and process enactment are core strengths and foundational services of the Salesforce Platform that enable customers to easily automate business processes and operate more efficiently using point-and-click. Processes can be simple tasks - such as creating an activity, emailing an alert, updating a data field, or posting a message to a chatter feed - or more complex – such as sending data to external or third party systems and applications via an integration message, creating new records and updating existing related records, launching other processes/flows, submitting records for approval, and more. The Salesforce Lightning Process Builder, together with workflow rules, actions and approvals enable you to rapidly design and run any business process in the cloud without infrastructure, software, or code. The Process Builder's simple and powerful design allows you to create your processes by using a convenient visual layout with point-and-click efficiency. For every business rule or system event a customer needs to enact, one or more actions can be defined for execution when the specified conditions are met. These actions are created using point-and-click visual editors by a system administrator or business analyst and do not require complex procedural source code. Processes and workflow rules support several different types of actions. Salesforce Process and Workflow Actions: •Create a Record – Creates a new record (Account, Contact, Case, Event, etc.) in the system and sets the desired values in the new record's data fields. For example, in a 311 system, when a case's status changes to "Field Service Required", automatically create a new Work Order record, assign it to a technician and set a target completion date. •Update a Record / Field Updates – Updates a field within the record for which the rule was created or a related record. Values can be set specifically, or can be calculated using related records and built in functions within the formula editor. In a Safety Tracking application, for example, when the status is changed to ""Investigate Incident"" the record could be automatically reassigned to the Safety Investigator and safety related fields could be auto-populated.
BR10.24		The system shall provide for an individual TA staff dashboard, customizable based upon preferences, applications, job functions, etc., to be configured/assigned by system administrator	M	S	

BR10.25		The system shall allow administrative management functionality such as, but not limited to: Creation, inquiry, changes, and deletions of users and role management.	M	S	Salesforce has a Setup environment that allows a customer's Administrator to configure the application based on their specific requirements through a declarative framework (point and click). The organization administrator (appointed by the TA and not by Salesforce) has access to the admin interfaces in order to configure default settings, custom fields, custom reports, role-hierarchies, add new users, reset passwords, set default pick-list values, and other functions. The organization administrator logs onto the application like other users within the organization; however, they have admin privileges granted to them which provide them with this additional access. User provisioning and management is performed through the Salesforce Administrative Setup environment. Users, their profiles, permissions and passwords may be managed, edited, activated and deactivated as needed by those with appropriate permissions. An administrator with appropriate privileges can manage session timeout, password policies, IP range login restrictions, delegated authentication/SSO, and requirements as part of this process. Additionally, our Help & Training includes a Getting Started Implementation Guide to provide new customers with help around how to prepare for your implementation, how to accomplish key tasks required for basic setup, how to engage users, ways to extend your deployment, and more. This Guide also has a complementary Getting Started workbook to document the process.
BR10.26		The system must provide a configurable tool for agency personnel to create reports, dashboards, modify data tables, etc., without knowledge of SQL or other like technology.	M	S	Ease of use is one of the most important factors in ensuring broad adoption of the solution and organizational utility. To achieve the highest value from the solution investment, the TA can customize the Salesforce solution to best fit its user's needs. The Salesforce Force.com cloud platform offers tools for "no compromise customizations," to make it possible to create both fast and easy configuration, as well as deep customizations to meet just about any need. The TA can easily customize the Salesforce application through clicks or code methodology. Salesforce configuration, development, and administration is focused 80% on clicks vs. 20% code, dramatically improving cost of ownership and enabling non-technical business users to easily extend existing Salesforce functionality and/or create entirely new applications that run in the Salesforce framework. Through the point-and-click methodology, custom fields, custom objects and new applications are easily configured in Salesforce. All customizations are stored as metadata and interpreted at runtime allowing the core code to be upgraded while guaranteeing that customizations will work across upgrades. Below are some of the more typical customizations made by users: - Customizable User Interface. Salesforce enables the TA to build user interfaces that match its brand, look and feel, and the exact behavior you need and can be done through our declarative development tools (point and click, drag and drop). Users can further augment their individual view through the same point and click process so that they get a solution that is personal, and fits their work style. - Customizable Workflow. The TA will have the ability to set up workflow with simple clicks. Automate common operations such as tasks, alerts, data population, outbound XML messages and more without IT support or code. - Customizable Objects and Fields. New fields, objects, and applications are easily configured in Salesforce. Our point and click, drag and drop methodology enables the TA to easily extend existing Salesforce functionality and/or create entirely new applications that run in the Salesforce framework. - Customization of Reports. The Salesforce solution includes a powerful suite of analytics and reporting tools to help you view and analyze your data that can be accessed via the web or mobile device in real-time. Customizing

BR10.27		For all records, permit only authorized users to view, add, or modify records depending on level of identified access provided, allowing management to grant specific access.	M	S	There are four sharing models: Private: Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records. Public Read Only: All users can view and report on records but not edit them. Only the owner, and users above that role in the hierarchy, can edit those records. Public Read/Write: All users can view, edit, and report on all records. Public Read/Write/Transfer: All users can view, edit, transfer, and report on all records. Only available for cases or leads. In addition, Field-Level Security provides more granular control over the access that users have to individual fields, and can restrict users' access to view and edit those fields by any means (through reports, searches, etc).
BR10.28		The system must provide a method to assign retention schedules, notify when retention periods have been met, and track the disposition of disposal/destruction.	M	S	
BR10.29		The system must provide the ability for system administrator to add fields, modify field options, etc.	M	S	Salesforce administrators can define custom fields through the point-and-click Setup environment for any standard or custom objects. New fields created in Salesforce are immediately usable, searchable and reportable in the application. Custom fields are also immediately available through the Application Programming Interface (API). There are more than 20 different custom field data types you can choose from including: Auto Number, Checkbox, Currency, Date, Date/Time, Email, External Lookup Relationship, Formula, Geolocation, Hierarchical Relationship, Indirect Lookup Relationship, Lookup Relationship, Master-Detail Relationship, Number, Percent, Phone, Picklist, Picklist (multi-select), Roll-Up Summary, Text, Text (Encrypted), Text Area, Text Area (Long), Text Area (Rich), URL. For more details please see: https://help.salesforce.com/apex/HTViewHelpDoc?id=custom_field_types.htm
BR10.30		The system shall interface with TA's existing desktop and all-in-one printers and scanners.	M	S	

BR10.31		The system shall provide for a mobile environment interface for use with various hand-held devices and provide wireless printing support and forms conversion for investigators and inspectors in the field..	M	S	Salesforce1 mobile app Mobility is a native capability of the Salesforce Platform. The Salesforce1 mobile app is built on the Salesforce Platform and provides the TA's agents with a completely unified mobile experience across a variety of mobile devices, including iOS and Android smartphones and tablets. Virtually all functions in the application proper can be accessed through our Salesforce1 mobile app such as collaboration, workflow and approvals and much more. Mobile support is standard, out-of-the-box functionality and requires no customization or 3rd party mobile application development tools. Configure your enterprise app once and it's instantly mobile from the get-go. The Salesforce1 mobile app allows the TA users to access Salesforce solutions from anywhere, bringing all of the Salesforce customizations, configurations, settings, and data to any device. Salesforce1 mobile app can be instantly distributed to mobile users each time a new app is created – with no deployment headaches. With the power of the platform, administrators can build applications on the desktop and then mobile-enable them with just a few clicks. From custom tabs and configurations to Salesforce pages and more, the TA can tailor mobile deployments for individual users or groups so that everyone is ultra-productive, no matter where they are located. Mobile enables the TA to: develop and run mobile and desktop apps on a single cloud computing platform; create customized mobile profiles that are specific to a user or group's needs; and push customizations over the air automatically so users never have to sync devices. Salesforce1 Mobile Partner Applications For many years running, Salesforce offers a rich ecosystem of applications built by its partners, and offered through the Salesforce AppExchange. This ecosystem supports and enables a wide variety of use cases, many of which are now enabled on mobile devices. Already there are over 300 partner apps are listed under: https://appexchange.salesforce.com/collection/salesforce1-mobile. Mobile Field Workers
BR10.32		The system shall generate all output in softcopy such as, but not limited to: Emails, PDFs, HTML's, etc.	M	S	
BR10.33	**Workflow Scheduler**	The system shall provide a visual dashboard representing workflow job queue status pending and completed as well as any error conditions which may exist.	M	S	
BR10.34		The system shall provide a flexible and user friendly workflow scheduler.	M	S	Process and workflow actions may be classified as immediate or time-dependent/scheduled. Immediate actions are invoked as soon as the workflow rule is triggered. Time dependent actions are scheduled to invoke at some point in the future and are scheduled to occur in an hour or day count relative to the trigger time of the rule or a date/time field on the related record. Workflow rules may have both multiple immediate actions and multiple time-based actions.
BR10.35		The system shall provide automated tracking of workflow changes.	M	S	The Salesforce platform allows administrators to version their workflow processes using workflow process builder. This feature allows administrators to build additional workflow process versions while a prior version remains active. In addition, Salesforce field audit trail allows users to review before and after snapshots of fields updated by the workflow engine.
BR10.36		The system shall provide scheduler functions such as, but not limited to: Dependency settings, rescheduling, reruns, pausing jobs, adds, changes, deletions, undo capability, confirmation dialogs, job failure codes, job tracking, etc.	M	S	
BR10.37		The system shall provide documentation associated with every workflow job.	M	S	
BR10.38		The system shall provide workflow information using a "hover" functionality.	M	S	The Salesforce Platform supports out of the box field-level help. An information icon is associated with any field in the workflow that has associated field-level help text and users can hover over the field help icon to view the related help information and workflow.
BR10.39		The system shall provide scheduler dashboard functionality.		S	An analytic snapshot lets you report on historical data. Authorized users can save tabular or summary report results as snapshots on a schedule. Analytic snapshots let you work with report data similarly to how you work with other records in Salesforce. For example, a customer support manager could set up an analytic snapshot that reports on the open cases assigned to his or her team every day at 5:00 PM, and store that data in a custom object to build a history on open cases from which he or she could spot trends via reports. Then the customer support manager could report on point-in-time or trend data stored in the custom object and use the report as a source for a dashboard component.

BR10.40		The system shall provide real-time notification of security violations.	M	S	Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you'll find: • Live and historical data on system performance • Up-to-the minute information on planned maintenance • Phishing, malicious software, and social engineering threats • Best security practices for your organization • Information on how we safeguard your data In addition to the Salesforce Trust site (trust.salesforce.com) to monitor uptime and performance, the TA will also have access to a System Overview, which will help you monitor performance and usage of your own Salesforce org. This overview includes: • Schema - # and % of custom objects and data storage • API Usage - # and % of requests in the last 24 hours • Business Logic - # and % of Rules, Apex triggers and classes, as well as % of code used • User Interface - # and % of custom apps, published Site.com sites, active Force.com sites, active flows, custom tabs and Visualforce pages • Most Used Licenses - the top three used licenses for your organization • Portal Roles - # and % for total Partner Portal, Customer Portal and Communities roles Health Check lets the TA understand and proactively remediate your Salesforce org's security risks and vulnerabilities from a single page. At a glance, the TA can see and fix security risks for your org in your Session Settings, Password Policies, and Network Access settings. A health check dashboard shows how well your org measures against the Salesforce-recommended baseline. The Salesforce Baseline standard contains recommended values for the Session Settings, Password Policies, and
BR10.41		The system shall allow encryption of all data elements.	M	S	The TA released Amendment 1 which included the following response to question #56: The primary requirement is to encrypt sensitive Personal Identifiable Information (PII), such as social security numbers. Encryption Capabilities Salesforce has many customers that are subject to laws pertaining to the processing of personally identifiable information (PII) or personal data. Salesforce offers its customers a broad spectrum of functionalities and customer-controlled security features that its customers may implement in their respective uses of the Salesforce services. Salesforce believes that these provide its customers the flexibility to comply with laws with stringent privacy and security requirements. Data In Motion All transmissions between the user and the Salesforce Services are TLS encrypted with a 2048-bit Public Key. The Services use International/Global Step Up TLS certificates, with AES 256-bit encryption by default. Data At Rest Salesforce includes a feature to encrypt custom text fields (ECF): - The fields can be masked appropriately for specific data types (i.e., credit card number, Social Security Number, National Insurance Number, Social Insurance Number). - Users that cannot see the data will see an input mask which can be configured to partially reveal some of the value if required (e.g. the last 4 digits of a credit card number). - Access to read the masked parts of the fields is limited by the "View Encrypted Data" permission, which is not enabled by default. - Customers can manage their encryption key based on their organization's security needs and regulatory requirements. See our Help and Training site for details: https://help.salesforce.com/apex/HTViewHelpDoc?id=security_keys_using_master.htm&language=en - Encrypted fields are encrypted with 128-bit keys and use the AES (Advanced Encryption Standard) algorithm.
BR10.42		The system shall provide the latest records to be available real-time.	M	S	Data saved in Salesforce is searchable and reportable in real-time.

BR10.43		The system shall provide archival configuration management.	M	S	Active customer data stays on disk until the customer deletes or changes it. Customer-deleted data is temporarily available (15 days) to customers online from the Recycle Bin. The retention policy for backup media is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If a Salesforce customer must preserve data and the retention procedures above are insufficient, they may schedule a weekly export of data or copy to a sandbox account. Exports of Customer Data are available in comma separated value (.csv) format by request via Salesforce's Customer Support department. In addition, many exports can be manually pulled by the designated org administrators.
BR10.44		The system shall provide seamless access to archived records.	M	S	Active customer data stays on disk until the customer deletes or changes it. Customer-deleted data is temporarily available (15 days) to customers online from the Recycle Bin. The retention policy for backup media is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If a Salesforce customer must preserve data and the retention procedures above are insufficient, they may schedule a weekly export of data or copy to a sandbox account. Exports of Customer Data are available in comma separated value (.csv) format by request via Salesforce's Customer Support department. In addition, many exports can be manually pulled by the designated org administrators.
BR10.45		The system shall provide a browser based platform for all functions in this RFP.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
BR10.46		The system shall work with the latest version of browsers such as, but not limited to: IE, Edge, Mozilla, Chrome, etc.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
BR10.47		The vendor proposed system shall be either hosted, cloud based or EITS hosted.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
BR10.48		The vendor shall provide minimum recommendations for the computer/workstation requirements.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
BR10.49	**Cloud Computing**	At deployment time, the vendor's proposed solution can include a cloud proposal.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.
BR10.50		The vendor can propose a cloud-ready, based technology to meet the requirements of the TA.	M	S	Based on your requirements, we are proposing a pure multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce hosts the entire solution, thus freeing up the TA to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, IE). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere an internet connection and supported browser are available, including mobile devices.

BR10.51		If proposing a cloud solution, the vendor shall provide a definition of the proposed cloud-ready technology to include, but not limited to: Storage, critical/non-critical components, Disaster/Recovery, Networks connectivity, vendor pipes used for data transport, etc.	M	S	**Hardware/Software** Our proposed SaaS solution is built on the Salesforce Platform and includes all needed infrastructure, which is fully hosted, managed, and maintained by Salesforce. Salesforce only requires a computer that can run a web browser and an Internet connection or a mobile device. No other software or hardware is required. Salesforce applications are delivered on-demand over the Internet, so the TA will not need to worry about licensing software or setting up and managing hardware platforms. **Storage** Salesforce provides extensive storage capabilities. Storage is divided into two categories: file storage and data storage. File storage includes files in attachments, the Documents tab, the Files tab, the File field, Salesforce CRM Content, Chatter (including user photos), and Site.com assets. Data storage includes the following entities/records stored within the Salesforce application: Accounts, Article types, Article type translations, Campaigns, Campaign Members, Cases, Case Teams, Contacts, Contracts, Custom objects, Email messages, Events, Forecast items, Google docs, Ideas, Leads, Notes, Opportunities, Opportunity Splits, Orders, Quotes, Quote Template Rich Text Data, Solutions, Tags: Tag applications, Tags: Unique tags, and Tasks. For file storage, Unlimited Edition is allocated a per-user limit multiplied by the number of users in the organization plus an additional per-organization allocation. For example, an Unlimited Edition organization with 600 users receives 1,211 GB of file storage, or 2 GB per user multiplied by 600 users plus an additional 11 GB. For data storage, Unlimited Edition is allocated either 1 GB or a per-user limit, whichever is greater. For example, an Unlimited Edition organization with 10 users receives 1 GB because 10 users multiplied by 20 MB per user is 200 MB, which is less than the 1 GB minimum. Additional storage can be purchased, or files can be exported and archived outside of Salesforce, thus freeing up file storage space. For additional information, visit: https://help.salesforce.com/HTViewHelpDoc?id=limits_storage_allocation.htm&language=en_US
BR10.52		A proposed cloud-ready solution shall reside in the contiguous U.S.	M	S	With the Salesforce Government Cloud, all data will be housed in the United States and support will be provided by Qualified U.S. Citizens.
BR10.53		A proposed cloud-ready solution shall encrypt all data transmission.	M	S	All transmissions between the user and the Salesforce Services are TLS encrypted with a 2048-bit Public Key. The Services use International/Global Step Up TLS certificates, with AES 256-bit encryption by default.
BR10.54		A proposed cloud-ready solution shall have encryption on all storage devices.	M	S	The TA released Amendment 1 which included the following response to question #56: The primary requirement is to encrypt sensitive Personal Identifiable Information (PII), such as social security numbers. Encryption Capabilities Salesforce has many customers that are subject to laws pertaining to the processing of personally identifiable information (PII) or personal data. Salesforce offers its customers a broad spectrum of functionalities and customer-controlled security features that its customers may implement in their respective uses of the Salesforce services. Salesforce believes that these provide its customers the flexibility to comply with laws with stringent privacy and security requirements. Data In Motion All transmissions between the user and the Salesforce Services are TLS encrypted with a 2048-bit Public Key. The Services use International/Global Step Up TLS certificates, with AES 256-bit encryption by default. Data At Rest Salesforce includes a feature to encrypt custom text fields (ECF): - The fields can be masked appropriately for specific data types (i.e., credit card number, Social Security Number, National Insurance Number, Social Insurance Number). - Users that cannot see the data will see an input mask which can be configured to partially reveal some of the value if required (e.g. the last 4 digits of a credit card number). - Access to read the masked parts of the fields is limited by the "View Encrypted Data" permission, which is not enabled by default. - Customers can manage their encryption key based on their organization's security needs and regulatory requirements. See our Help and Training site for details: https://help.salesforce.com/apex/HTViewHelpDoc?id=security_keys_using_master.htm&language=en - Encrypted fields are encrypted with 128-bit keys and use the AES (Advanced Encryption Standard) algorithm.

BR10.55		A proposed cloud-ready solution shall meet the State's IT security requirements defined in this RFP.	M	S	Salesforce provides a flexible, configurable FedRAMP certified solution that can support the TA's business rules requirements, processes, and standards. Salesforce has a FedRAMP Agency Authority to Operate at the moderate impact level. To obtain compliance with FedRAMP, Salesforce conducted security assessment and authorization activities in accordance with FedRAMP guidance, NIST 800-37, and HHS guidance. To maintain compliance with FedRAMP, Salesforce conducts continuous monitoring, which includes ongoing technical vulnerability detection and remediation, remediation of open compliance related findings, and at least annual independent assessment of a selection of security controls. As part of the implementation of the Salesforce solution for the TA,**TDC will** work with the TA to review the applicability of the State's IT security requirements that need to be configured in the context of the SaaS solution delivered by Salesforce. The Salesforce Platform is extensible, enabling the TA with minimal effort to add additional custom fields and create automated workflows that are required to support the TA's specific business processes. Salesforce will maintain administrative, physical, and technical safeguards for protection of the security, confidentiality and integrity of Customer Data. Those safeguards will include, but will not be limited to, measures for preventing access, use, modification or disclosure of Customer Data by Salesforce personnel except (a) to provide the Services and prevent or address service or technical problems and as compelled by law.
BR10.56	**Miscellaneous**	The vendor will provide technical support after go-live of each phase of the project for at least two months.	M	S	Based on the TA's requirements, we are proposing the Premier+ Success Plan. The Premier+ Success Plan offers end-user training on Salesforce products and gives a place to educate your Salesforce admins and developers. Access to our complete library of more than 100 online courses builds expertise on Salesforce products, drives value, and maximizes ROI. With the Government Cloud, all data will be housed in the United States and support will be provided by Qualified U.S. Citizens. The TA can take advantage of the following benefits of the Premier+ Success Plan: - Unlimited access to our entire online course catalog - 24x7 toll-free phone support - Priority case queuing and routing - Quick initial 1-hour response time for critical issues - An assigned support account rep - Force.com code troubleshooting - Customizable end-user course templates - Premier Success Review to measure usage and trends - Access to our pool of Salesforce Certified Administrators who can configure and maintain your Salesforce editior - More than 100 administrative services In addition, Government Cloud users that have the Premier+ Success Plan will be provided with technical support from Qualified U.S. Citizens. Support cases submitted online will be automatically routed to a team of Qualified U.S. Citizens. Telephone support is also available in English, 24 hours a day, seven days a week, however calls for support received via telephone will be initially responded to by individuals who may not be Qualified U.S. Citizens and who may be located outside the United States. These individuals will then route cases to a team of Qualified U.S. Citizens. Support cases submitted via Chat will not be responded to by Qualified U.S. Citizens. All other personnel, including Customer Success Managers, Success Account Managers, Customer Success Technologists
BR10.57		The vendor will provide a training plan.	M	S	
BR10.58		The vendor shall provide training materials and scenarios.	M	S	

BR10.59		The system shall include a fully functional training environment with data	M	S	Salesforce offers both a Production environment and 4 different types of Sandbox environments. This gives you the ability to create multiple copies of your organization in separate environments for a variety of purposes, such as testing and training, without compromising the data and applications in your Salesforce production organization. The usage of the various Salesforce Sandbox types during an implementation varies, but below will provide you with a description and common use of each type of environment: Developer Sandbox Developer sandboxes are designed for a single developer and intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). Developer sandboxes have a storage limit to 200 MB of data and 200 MB of files, which is enough for many development and testing tasks. You can refresh a Developer sandbox once per day. Developer Pro Sandbox Developer Pro sandboxes are intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). They have a larger storage limit than Developer sandboxes, up to 1 GB of data and 1 GB of files. The larger limit allows for more robust test data sets and enables this environment to handle more development and quality assurance tasks. You can refresh a Developer Pro sandbox once per day. Partial Copy Sandbox Partial Copy sandbox environments include all of your organization's configuration (metadata) and a subset of your production data that you define by using a sandbox template. Use Partial Copy sandboxes for virtually any development, testing, or training purpose. The only tasks for which they aren't well-suited are full performance and load testing. Additionally, as defined by your sandbox template, Partial Copy sandboxes can include your organization's standard and custom object records, documents, and attachments up to 5 GB of data and 5 GB of
BR10.60		The vendor shall develop and provide a user manual	M	S	
BR10.61		The vendor shall develop and provide a system administration/operations guide.	M	S	An extensive Knowledgebase, full documentation, best practices, tips and tricks are all available to end users through Salesforce Help & Training, accessible right from within the Salesforce application.
BR10.62		The system shall include a test environment and fully functioning system, including test data.	M	S	Salesforce offers both a Production environment and 4 different types of Sandbox environments. This gives you the ability to create multiple copies of your organization in separate environments for a variety of purposes, such as testing and training, without compromising the data and applications in your Salesforce production organization. The usage of the various Salesforce Sandbox types during an implementation varies, but below will provide you with a description and common use of each type of environment: Developer Sandbox Developer sandboxes are designed for a single developer and intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). Developer sandboxes have a storage limit to 200 MB of data and 200 MB of files, which is enough for many development and testing tasks. You can refresh a Developer sandbox once per day. Developer Pro Sandbox Developer Pro sandboxes are intended for coding and testing in an isolated environment. These environments include a copy of your production organization's configuration (metadata). They have a larger storage limit than Developer sandboxes, up to 1 GB of data and 1 GB of files. The larger limit allows for more robust test data sets and enables this environment to handle more development and quality assurance tasks. You can refresh a Developer Pro sandbox once per day. Partial Copy Sandbox Partial Copy sandbox environments include all of your organization's configuration (metadata) and a subset of your production data that you define by using a sandbox template. Use Partial Copy sandboxes for virtually any development, testing, or training purpose. The only tasks for which they aren't well-suited are full performance and load testing. Additionally, as defined by your sandbox template, Partial Copy sandboxes can include your organization's standard and custom object records, documents, and attachments up to 5 GB of data and 5 GB of

BR10.63		The system shall be flexible enough to support the capability of adding another agency in the future or supporting the merger of another agency, including differences in operating procedures.	M	S	Salesforce is a pure multi-tenant, cloud-based web application. Multi-tenancy gives applications elasticity. Force.com applications can automatically scale from one to tens of thousands of users. Processing more than 4 billion transactions each day, Force.com is used for large-scale deployments. Any application that runs on Force.com is automatically architected to seamlessly scale from 1 user to 100,000 users without the customer having to do anything differently. All applications (includes mobile, offline and read-only options) and data running on Force.com are deployed to and replicated across multiple data centers in different geographies. Every application, no matter how large or small, gets the full benefits of the backup, failover, disaster recovery, and other infrastructure services required for an organization's mission-critical applications.
BR10.64		The system shall include tools that allow business users to design, author, and manage content.	M	S	Salesforce offers the following different ways to store, publish, and tag files and documents. All file types are supported from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs. Files Tab: Upload, store, find, follow, share, sync, and collaborate on Salesforce files in the cloud. For example, upload a file in Chatter and store it there privately until you're ready to share it. Share the file with coworkers and groups to collaborate and get feedback. Attach files to posts in a Chatter feed on the Home tab, Chatter tab, a profile, a record, or a group. Users with access to Salesforce Files Sync can access, sync, and share files in their Salesforce Files Sync folder. Salesforce Files can be used with or without Chatter. With Chatter turned off, the Files tab (Files home) is available: upload, share, view, and manage files. Salesforce Content: Publish and share official corporate files with coworkers and deliver them to customers. Documents are uploaded in Salesforce Content via a graphical user interface and a structured workflow process. This process captures key information related to the document, including file name, description, author, tags, document type, and any custom criteria you choose to collect. For example, Create, clone, or modify a document and save it so only you can see it and work on it. When you're ready, publish it so other users in your organization have access to it. Create a content pack and send it to customers. Documents Tab: Store Web resources, such as, logos, DOT files, and other Visualforce materials in folders without attaching them to records. For example, add a custom logo to meeting requests by uploading your logo to the Documents tab. Attachments: Attach files to records from the Attachments related list on selected detail pages. For example, add a file to a specific record, like an event, contact, or case by attaching it on the Attachments related list. Attachments exist in Salesforce only in the context of the record they're attached to. Files that users upload to the Attachments related list on records in Salesforce can also be set to become Salesforce Files objects. Once an Attachment is also a Salesforce File it can be shared with people, groups, libraries, and can be posted in feeds,
BR10.65		The system shall include electronic new permit and renewal permit application submissions, uploading of documents, individual user access, approximately 10,000 users per year, with multiple transactions per users per year.	M	S	Salesforce communities and workflow can support the business process for allowing customers to submit new permit applications and provide notifications for when renewals are due. Customers use Salesforce communities to complete a new or renewal application, submit documents and collaborate with state staff on the backend.

XII. Reference Materials

XIII. Other Information / Material

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 6/14/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Weaver Bros. Ins. Associates
4550 Montgomery Ave., #300N
Bethesda MD 20814

CONTACT NAME:
PHONE (A/C, No, Ext): 301-986-4400 **FAX (A/C, No):** 301-986-4422
E-MAIL ADDRESS:

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : CHUBB INSURANCE GROUP	2713
INSURER B : Philadelphia Insurance Co.	
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED TELEC-1
Telecommunications Development
1919 13th Street N.W.
Washington DC 20009

COVERAGES **CERTIFICATE NUMBER:** 753539968 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X **COMMERCIAL GENERAL LIABILITY**	Y	Y	3581-35-94 EUC	12/1/2016	12/1/2017	EACH OCCURRENCE	$1,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$1,000,000
							MED EXP (Any one person)	$10,000
							PERSONAL & ADV INJURY	$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$1,000,000
	POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$1,000,000
	OTHER:							$
A	**AUTOMOBILE LIABILITY**			(14) 7352-50-94	12/1/2016	12/1/2017	COMBINED SINGLE LIMIT (Ea accident)	$1,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	ALL OWNED AUTOS / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS / NON-OWNED AUTOS						PROPERTY DAMAGE (Per accident)	$
								$
A	X **UMBRELLA LIAB** X OCCUR			7984-20-48	12/1/2016	12/1/2017	EACH OCCURRENCE	$5,000,000
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$5,000,000
	DED X RETENTION $ 0.00							$
A	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** Y / N	N / A	Y	(16) 7171-42-53	12/1/2016	12/1/2017	X PER STATUTE / OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? N **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT	$1,000,000
							E.L. DISEASE - EA EMPLOYEE	$1,000,000
							E.L. DISEASE - POLICY LIMIT	$1,000,000
B	Professional			PHSD1235204	5/19/2017	5/19/2018	LIMIT DED	2,000,000 25,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

If required by written contract, "The State of Nevada is additional insured with respect to liability per policy terms and conditions arising out of the activities performed by the insured. A waiver of subrogation applies in favor of the additional insured for general liability and workers compensation. A 30 day notice of cancellation applies.

CERTIFICATE HOLDER

THE STATE OF NEVADA
101 N. CARSON STREET
CARSON CITY NV 89701

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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