AN ORDINANCE 2018-11-01-0860

APPROVING THE FOURTH AMENDMENT TO THE PUBLIC SECTOR AGREEMENT WITH VERINT AMERICAS, INC. AND THE SECOND AMENDMENT TO THE CONTRACT WITH CITYFLAG, INC. FOR PROJECT IMPLEMENTATION SERVICES TO UPGRADE THE CITY OF SAN ANTONIO'S CUSTOMER RELATIONSHIP MANAGEMENT ("CRM") SYSTEM WITH AN UPDATED AUTOMATION ENGINE AND MOBILE APP CHANGES FOR A TOTAL COST OF $146,819.32.

* * * * *

WHEREAS, the City's current CRM system was implemented in October 2011, authorized by Ordinance No. 2010-04-01-0273, and was last upgraded in November 2017 with the latest software version to include additional system functionality, authorized by Ordinance No. 2017-11-09-0874; and

WHEREAS, the CRM system continues to be utilized by the 311 Call Center, City Council offices, Animal Care Services, Development Services/Code Enforcement, Metro Health, Parks and Recreation, Solid Waste Management, and Transportation and Capital Improvements, and maintains customer data for residents who have called the City requesting services and have provided their information; and

WHEREAS, the City's 311 mobile application was implemented on April 4, 2017, as a result of a Request for Competitive Sealed Proposals and an informal contract awarded to CityFlag, Inc., to provide residents with a self-service portal to report calls for basic and specific City services; and

WHEREAS, an Amendment to the contract with CityFlag, Inc. became necessary and was therefore approved by City Council through Ordinance 2018-05-31-0383 to provide modifications to the mobile application code, which was proprietary to CityFlag, Inc.; and

WHEREAS, an upgrade is now required to the City's CRM system to allow for additional functionality through an updated process manager automation engine that will allow for the smooth transmittal of information from the CityFlag mobile application to the CRM system and a streamlined process by which the 311 Customer Service Office and various departments can track resident requests for services; and

WHEREAS, staff recommends approval of Amendments with Verint Americas, Inc. and CityFlag, Inc. to upgrade the current CRM system and 311 mobile application for a total amount of $146,819.32; **NOW THEREFORE:**

BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN ANTONIO:

SECTION 1. The City Manager or her designee, or the Director of Finance or his designee, is hereby authorized to execute an Amendment to the contract with Verint Americas, Inc. and an Amendment to include a task order to the contract with CityFlag, Inc., allowing the City to

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upgrade the existing CRM system. A copy of these Amendments in substantially final form are attached hereto and incorporated herein for all purposes as **Exhibit I** to this Ordinance.

SECTION 2. The budget in SAP Fund 43099000, Other Capital Projects, SAP Project Definition 09-00061, New Technology Projects, shall be revised by decreasing SAP WBS Element 09-00061-10-01 entitled Consulting Services, SAP GL account 5201040, by the amount of $146,819.00.

SECTION 3. The budget in SAP Fund 43099000, Other Capital Projects, SAP Project Definition 09-00061, New Technology Projects, shall be revised by decreasing SAP WBS element 09-00061-90-03-02 entitled Transfer from TN-20181-01-01-03, SAP GL account 6101100, by the amount of $146,819.00.

SECTION 4. The amount of $146,819.00 is reverted in SAP Fund 43904061, 2018 Tax Notes Information Technical Service, SAP WBS TN-20181-01-01-03, SAP GL account 6102100 - Interfund Transfer out entitled Transfer to 09-00061-90-03-02. The amount of $146,819.00.is authorized to be transferred from SAP Fund 43099000.

SECTION 5. The amount of $146,819.00 is appropriated in SAP Fund 43904061, 2018 Tax Notes Information Technical Service, SAP WBS TN-20181-01-01-0X, SAP GL account 6102100 - Interfund Transfer out entitled Transfer to 09-00072-90-01. The amount of $146,819.00 is authorized to be transferred from SAP Fund 43099000.

SECTION 6. The budget in SAP Fund 43099000, Certificates of Obligation Capital Project, SAP Project Definition 09-00072, CRM Lagan Updates, shall be revised by increasing SAP WBS element 09-00072-90-01 entitled Transfer from TN-20181-01-01-0X, SAP GL account 6101100, by the amount of $146,819.00.

SECTION 7. The amount up to $146,819.00 is appropriated in SAP Fund 43099000, Certificates of Obligation Capital Project, SAP Fund 09-00072, CRM Lagan Updates, SAP WBS Element 09-00072-01-01, entitled GASB 51 Development Costs, SAP GL Account 5201040.

SECTION 8. Payment in the amount of $97,412.32 in SAP Fund 43099000, Certificates of Obligation Capital Project, SAP Project Definition 09-00072, CRM Lagan Updates, is authorized to be encumbered and made payable to Verint Americas, Inc., for software and associated project implementation services to upgrade the City's Customer Relationship Management (CRM) system. Payment is limited to the amounts budgeted in the Operating and/or Capital Budget funding sources identified. All expenditures will comply with approved operating and/or capital budgets for current and future fiscal years.

SECTION 9. Payment in the amount of $49,407.00 in SAP Fund 43099000, Certificates of Obligation Capital Project, SAP Project Definition 09-00072, CRM Lagan Updates, is authorized to be encumbered and made payable to Cityflag, for software technical services. Payment is limited to the amounts budgeted in the Operating and/or Capital Budget funding sources identified. All expenditures will comply with approved operating and/or capital budgets for current and future fiscal years.
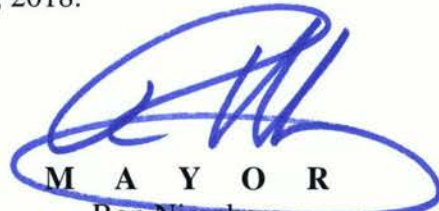
SECTION 10. The financial allocations in this Ordinance are subject to approval by the Director of Finance, City of San Antonio. The Director of Finance, may, subject to concurrence by the City Manager or the City Manager's designee, correct allocations to specific SAP Fund Numbers, SAP Project Definitions, SAP WBS Elements, SAP Internal Orders, SAP Fund Centers, SAP Cost Centers, SAP Functional Areas, SAP Funds Reservation Document Numbers, and SAP GL Accounts as necessary to carry out the purpose of this Ordinance.

SECTION 11. This ordinance shall be effective immediately upon passage by at least eight (8) votes and the 10th day after passage by fewer than eight (8) votes.

PASSED AND APPROVED this 1st day of November, 2018.

M A Y O R
Ron Nirenberg

ATTEST:

Leticia M. Vacek, City Clerk

APPROVED AS TO FORM:

Andrew Segovia, City Attorney

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Agenda Item:	6 (in consent vote: 5, 6, 7, 8, 9A, 9B, 9C, 9D, 9E, 12, 13, 14, 15A, 15B, 16, 18, 19, 21, 22, 23, 24, 27)							
Date:	11/01/2018							
Time:	09:55:28 AM							
Vote Type:	Motion to Approve							
Description:	Ordinance amending the agreement with Verint Americas, Inc. and approve a task order for Cityflag, Inc. in connection with the project implementation services to upgrade the Customer Relationship Management (CRM) system with an updated automation engine and mobile app changes for a total cost of $146,819.32. Funding for this amendment was previously authorized and appropriated from 2016 Tax Notes in the Capital Improvement Program. [Ben Gorzell, Chief Financial Officer; Troy Elliott, Deputy Chief Financial Officer, Finance]							
Result:	Passed							

Voter	Group	Not Present	Yea	Nay	Abstain	Motion	Second
Ron Nirenberg	Mayor		x				
Roberto C. Treviño	District 1		x			x	
William Cruz Shaw	District 2	x					
Rebecca Viagran	District 3		x				
Rey Saldaña	District 4		x				
Shirley Gonzales	District 5		x				
Greg Brockhouse	District 6		x				
Ana E. Sandoval	District 7		x				
Manny Pelaez	District 8		x				
John Courage	District 9		x				x
Clayton H. Perry	District 10		x				

Exhibit I

FOURTH AMENDMENT TO THE PUBLIC SECTOR AGREEMENT

BETWEEN VERINT AMERICAS INC. AND THE CITY OF SAN ANTONIO

STATE OF TEXAS	§
	§
COUNTY OF BEXAR	§

This FOURTH AMENDMENT TO THE PUBLIC SECTOR SUPPLY AGREEMENT by and between THE CITY OF SAN ANTONIO, a Texas Municipal Corporation ("**City**") and VERINT AMERICAS INC., a Foreign For-Profit Corporation ("**Verint**"), is hereby entered into by the parties. Together, City and Verint may be referred to herein collectively as the "Parties."

RECITALS

On April 1, 2010, the Public Sector Agreement (the "**Agreement**") between the parties was passed and approved by the City Council through Ordinance No. 2010-04-01-0273 ("**Ordinance**"). Subsequent to the passing of the Agreement through the Ordinance and its previous amendments, it has become necessary to issue this Fourth Amendment to the Agreement to upgrade the City's Customer Relationship Management system for the implementation of an automation engine to include the latest process manager.

AMENDMENT

NOW THEREFORE, the Parties hereby agree and amend as follows:

1.   ADDITION. Order 489890 - 1, together with its Attachments titled "Statement of Work" and "Fixed Fee Services," is attached hereto and fully incorporated herein for all purposes.

2.   PROVISIONS REMAIN IN EFFECT. All other terms, conditions, covenants and provisions of this Agreement, as previously amended, not specifically mentioned herein and revised by this document, are retained in their entirety, unchanged, and remain in full force in effect for the duration of said contract, and any renewals thereof.

3.   ENTIRE AGREEMENT. This Agreement, as amended, embodies the complete agreement of the parties hereto with regard to the subject matter contained herein, superseding all oral or written previous and contemporary agreements between the Parties relating to matters herein.

VERINT

ORDER: 489890 - 1

Attached to and made a part of the Public Sector Supply Agreement between the City of San Antonio and Verint Americas Inc., as amended, dated March 31, 2010 ("License Agreement").

1. PRODUCT AND ANNUAL SUPPORT FEES FOR THE FOLLOWING SYSTEM:

Item #	Description	List Price	Disc. %	Units	UOM	Sell Price
93-531-1088	Verint Government Process Management	99,000.00	49.49	1.00	Server	50,000.00
89-555-0102	Premium Maintenance Plan 1st Year	1,650.00	49.49	12.00	Month	10,000.00
					TOTAL PRODUCT AND SUPPORT FEE:	**60,000.00**

Solely with respect to this Order, Verint may increase the annual Support Fee for the first successive Support Term by no more than five percent (5%) above the 12-month value of the fee paid for the first initial Support Term (which begins upon execution of this Order and runs for twelve (12) months thereafter). The Support terms for Customer's maintenance and support plan can be found at www.verint.com/corporate/misc/support-americas.pdf, as updated by Verint from time to time.

The following definition(s) apply to this Order, and specify the type and manner in which each applicable product above is licensed for use hereunder in accordance with the terms and conditions of the Agreement:

"Server" means a physical computer server upon which the Software and/or Product is licensed to be installed and used.

2. FIXED FEE SERVICES FEES:

Item #	Fixed Fee Services Description	List Price	Disc. %	Units	UOM	Sell Price
89-555-0201	Fixed Fee Services To be delivered in accordance with the attached Statement of Work	44,014.50	15.00	1.00	Each	37,412.32
					TOTAL FIXED FEE SERVICES FEE:	**37,412.32**

TIMEFRAME FOR PERFORMANCE OF SERVICES: The Services set forth herein shall be performed within six (6) months after the date Verint executes this Service Order. Customer's failure to make use of such Services within this period will result in Customer forfeiting its right to the Services at the fees referenced herein. **ALL AMOUNTS ARE VERINT CONFIDENTIAL INFORMATION, AND ARE VALID UNTIL JANUARY 28, 2019.**

RESCHEDULING/CANCELLATION: Customer shall incur a rescheduling/cancellation fee if Customer reschedules or cancels Services within two (2) weeks prior to the scheduled start date. In addition to such rescheduling/cancellation fee, Customer shall pay all Expenses Verint cannot reasonable recover in connection with the rescheduling/cancellation of the scheduled start date.

NOTE: All fees are exclusive of, and Customer shall be solely responsible for, all taxes, duties, and other costs, including shipping, insurance, and handling, where applicable. Customer is responsible for and shall reimburse Verint for all reasonable out-of-pocket expenses incurred by Verint in the performance of the services relating to this Order.

3. TOTAL FEES FOR THIS ORDER: 97,412.32

4. FIXED FEE SERVICES FEES: Verint shall invoice Customer on a milestone basis in the amounts stated in the table below upon receipt of the COS for the applicable milestone. Customer shall pay each invoice amount within thirty (30) days of invoice.

MILESTONE	MILESTONE DEESCRIPTION	INVOICE AMOUNT
1	Project Initiation	$4,530.50
2	Delivery of Generic Listener to the QA Environment	$13,101.00
3	Completion of Generic Listener UAT	$11,345.32
4	Deployment of Generic Listener to Production for Go Live	$8,435.50

5. ADMINISTRATIVE:

Address Type	Reference	Contact Name	Email	Phone	Address
Install/ Shipping/ Project	San Antonio, TX	Jeannette Kriewald	Jeanette.kriewald@sanantonio.gov	210-207-7947	515 S. Frio San Antonio, Texas 78207
Billing	San Antonio, TX	Ray Vilca	raymundo.vilca@sanantonio.gov	210-207-5005	111 Soledad, Suite 900 San Antonio, Texas 78205
Business Contact	San Antonio, TX	Paula Stallcup	paula.stallcup@sanantonio.gov		8130 Inner Circle San Antonio, Texas 78235

VERINT.

6. COMPLIANCE WITH LAWS:

By placing this Order with Verint, Customer represents and warrants to Verint that: (i) the products and services applicable to this Order are not intended for delivery or use in any countries embargoed or sanctioned under US export or other laws, (ii) the products and/or services will not be used in or to assist in the design, development, constructions, fabrication, testing, operation, stockpiling or use of nuclear weapons, materials or facilities, rocket systems or unmanned air vehicles, or chemical or biological weapons, and (iii) the products provided hereunder will not be used by any military or be put to any military end-use.

7. ACKNOWLEDGEMENT:

IF THE ABOVE SYSTEM(S) IS/ARE FOR AN AFFILIATE AS DEFINED IN THE AGREEMENT, THE SIGNATURE BELOW CONSTITUTES SUCH AFFILIATES REPRESENTATION AND WARRANTY TO VERINT THAT AFFILIATE HAS RECEIVED A COPY OF, HAS READ AND UNDERSTANDS THE AGREEMENT, AND AGREES TO ABIDE BY ALL TERMS AND CONDITIONS THEREOF AND THAT NO PURCHASE ORDER IS REQUIRED BY CUSTOMER FOR THE TRANSACTION IDENTIFIED IN THIS ORDER. THE PARTIES HERETO REPRESENT AND WARRANT TO EACH OTHER THAT THE RESPECTIVE PARTYS SIGNATORY BELOW HAS THE AUTHORITY TO BIND THE PARTY.

ACCEPTED: ACCEPTED:

VERINT AMERICAS INC.   **CITY OF SAN ANTONIO**

_____   _____
Authorized Representative   Authorized Representative

_____   _____
Printed Name   Printed Name

_____   _____
Title   Title

_____   _____
Date   Date

THE TERMS, CONDITIONS, AND FEES CONTAINED IN THIS ORDER ARE VALID PROVIDED IT IS EXECUTED BY CUSTOMER/AFFLIATE AND RECEIVED BY VERINT ON OR BEFORE OCTOBER 31, 2018.

VERINT

	Statement of Work To Order No.
	489890

Customer Name:	City of San Antonio
Account Executive:	Steve Arsenault
VP of Services:	Stuart Connolly
Services Delivery Manager:	Kesha Lacks

Introduction

This statement of work ("**SOW**") is an attachment to Order No. 489890 ("**Order**") and is entered into by and between Verint Americas Inc. ("**Verint**") and City of San Antonio ("**Customer**"). The following attachments are incorporated herein and made a part hereof by reference (the "**Attachments**"):

Attachment A: Fixed Fee Services

With respect to this SOW, and regardless how so defined in the Agreement, any reference to "Customer" herein shall be a reference to the entity (other than Verint) that executed the Agreement. With respect to any performance, acknowledgements or other documents that are required under this SOW from Customer for Verint to perform or as a result of Verint's performance, Customer's obligations must be satisfied by Customer, or, in the event Customer is a reseller, must be satisfied either by Customer or Customer's end customer.

Summary of the Services:	Verint have been asked to deliver an enhancement to the Customer GUMB integration with Engagement Management (EM) Professional.
	The enhancement will take the form of a "Generic Listener" component. This listener will process messages from the Customer back office systems (Chameleon, ECCO and SAPP) and update EM Professional as required.

	The functionality included by the new Generic Listener includes:
	• Update of cases in EM Professional following updates in the back office systems. This includes the closing of the case, completing case tasks and addition of case notes.
	• Addition of the back office reference to the EM Professional case reference
	• Handling of case status changes for any of the following event types:
	   o Case Reopened
	   o Case Reclassified
	   o Case Reassigned / Reallocated
	• Calculation of a new SLA following case reassignment or reclassification

1. Site Readiness

The purpose of this section is to clearly state that Customer is responsible for preparing their sites pursuant to specific technical requirements prior to commencement by Verint of performance of the services.

    A. Where applicable, Verint has provided Customer information identifying the hardware and non-Verint software necessary for that implementation. Customer is responsible for purchasing, installing and configuring all Customer furnished equipment including necessary server operating systems, network firewalls, cabling, and database management systems which meet Verint's minimum specifications as provided to Customer in writing under this SOW and the Order.

B. <u>Failure to Prepare – Impacts to Project Schedule</u>. Customer's failure to timely prepare the Site(s) could cause delays in the project and slippage in the project schedule. For Fixed Fee agreements, Verint may, at its option, execute a Change Order for additional time needed to complete the services due to such delays, including travel expenses as applicable.

2. Service Hours

"Normal Business Hours" means 8:00 A.M. to 6:00 P.M., Customer's local time, Monday through Friday, excluding Verint holidays.

"Premium Services" means Services performed by Verint outside of Normal Business Hours, at Customer's request, and not caused by a delay or mistake solely caused by Verint.

This Statement of Work includes 0 days of Premium Services. In the event that additional Premium Services are required, Customer and Verint will execute a Change Order Approval Request adding additional Premium Services to this Statement of Work. All Premium Services are subject to a fifty percent (50%) premium.

3. Travel and Expenses

Service Fees are exclusive of travel and living expenses. Travel and living expenses will be incurred in accordance with the federal per diem rates published by the General Services Administration. Incidental expenses include tips to maids, hotel staff, and shuttle drivers and other minor travel expenses. Per diem rates are available at www.gsa.gov/perdiem. Travel time may not be included as part of the amounts payable by Customer for any services rendered under the Contract. Air transportation shall be booked at the lowest available coach fare available at the time. Anticipated travel expenses must be pre-approved in writing by Customer.

4. Scheduling

During Project Kickoff, Customer and Verint will review the Services to be performed and develop a written project schedule identifying agreed upon dates for performance of the Services. Verint personnel and other resources will be assigned to the project in accordance with the agreed upon project schedule at that time.

5. Customer Responsibilities

Verint's performance of services is strictly dependent on Customer's timely completion of all Customer obligations. In addition to Customer's obligations as set forth in the Attachment(s), Customer must also:

A. Provide Verint personnel access to network, buildings, facilities and rooms specific to the Services.
B. Arrange for workspace as needed by on-site Verint personnel.
C. Provide required resources to participate in the development and testing activities.
D. Provide all relevant documentation and information to Verint in a timely manner.
E. Procure and install Customer environments and third party software according to the schedule.

6. Project Roles

The Verint Project Manager and Customer's Project Lead, as defined below, will identify necessary team roles and assign team personnel during project initiation as appropriate to the services being delivered under this SOW.

A. Verint Team
  1. *Project Manager:* This individual is responsible for managing the implementation process to completion and is the primary contact for the Customer. The Verint Project Manager is the facilitator for all project activities and is responsible for managing project budget, scope, timeline, and scheduling of all Verint resources.
  2. *Solution Architect:* Responsible for overall design and architecture for implementing the Verint solution in the Customers environment.
  3. *Technical Consultant:* These individuals are responsible for handling environment setup and configurations .They will work with Customer resources to confirm that security and networks settings are in place to allow required system to communicate.

B. Customer Team
  1. *Customer Project Lead:* This individual is responsible for the overall Project and is the Business owner; helps with issues and escalations for the Project.

2. *Customer Project Manager:* This individual is Customer's single point of contact for Verint and is responsible for onsite project coordination, Customer resource scheduling, and ensuring performance of Customer responsibilities. This individual must be authorized by senior management with the decision-making powers to ensure the success of the implementation or Services engagement.

3. *Business Resources:* These individuals may be called upon to answer questions about policies, people, queues, and other operational information needed for their specific sites.

4. *Technical Resources:* These individuals may be called upon to answer technical questions regarding Lagan and associated interfaces.

5. *Business Users:* These are the primary end users of the Verint software.

6. *Server Administrator:* This individual is responsible for the day-to-day physical care of the Verint software server(s), managing backup and disaster recovery strategies, configuring network addresses, ports, and firewalls.

7. Communication and Escalation Process

The Verint Project Manager will maintain ongoing communications and attend and/or participate in meetings during Normal Business Hours at times mutually acceptable to the parties for the duration of the project. At any time, project issues or concerns can be escalated beyond the Verint Project Manager by contacting the VP Services.

8. Assumptions

1. Both Customer and Verint will assign project leads to this project and be responsible for managing their respective tasks and personnel according to a mutually agreed schedule.

2. Both Customer and Verint will select qualified personnel to perform their respective tasks.

3. If a project is placed on hold it creates additional work to stop and then later reengage which may require a change order to restart the project to add this extra work.

4. Both parties recognize their mutual interests in working together to achieve a successful project within budget.

5. All identified pre-requisites are met and mutually agreed in advance of Services commencing.

6. Verint project management and project activities will be conducted remotely unless specified in this SOW.

7. Customer will provide access, servers and support during the install of Verint Process Management and ensure all pre-requisites have been met. Customer will be responsible for providing a stable infrastructure throughout the project.

8. Customer will provide test plans/use cases as requested to allow Verint to complete basic integration tests prior to handover for UAT testing.

9. Customer shall provide suitably skilled staff to perform customer testing and configuration tasks as defined in an agreed timescale in both the production and non-production environments.

10. Customer shall have personnel available on a timely basis to facilitate Verint carrying out the activities described in this SoW

11. Testing of integration changes can take place using non-production instances of the back office systems and integration components A non-production environment will be available for configuration and test purposes.

12. Performance cannot always be guaranteed by Verint as there is often a dependency on other systems or components (e.g. server performance or database latency).

13. The GUMB integration is provided by and supported by CoSA

14. All back office systems will be supported by CoSA. This includes any changes required in each back office system to integrate with the new Generic Listener

15. The back office systems will notify the Generic Listener when a new message is ready to process. No polling of the back office systems or the GUMB database are considered in scope.

16. The format of messages from EM Professional to GUMB will remain consistent with the current GUMB message format. The format of messages from the back office systems back to EM Professional will be changed to XML format of an agreed schema.

17. The operation of the new Generic Listener is dependent on changes to the back office systems to handle new functionality such as reopening, reassignment or reclassification of cases.

18. Verint Process Management will be used to implement the functionality outlined in this proposal. The installation and operation of Process Management requires an additional licence which will be purchased as part of this enhancement. This will provide CoSA with the ability to:

- o modify or extend the functionality of the Generic Listener

- o utilize the functionality in Process Management for other purposes

19. The mapping of tasks to back office system status will be determined and maintained by CoSA

20. An SMTP server and database will be provided and supported by CoSA

21. The Generic Listener will only process form data from Verint Online Forms. EForm data will not be considered in scope for the integration.

22. The effort to implement the Generic Listener is based only on the functionality outlined in this document and may be subject to change should requirements change.

23. Any database changes (e.g. the updating of time stamps) in the EM Professional database is deemed functionality which may require refactoring in future versions of EM Professional as database schemas may be subject to change

9. Non-Solicitation

During the term of the Agreement and for a period of one (1) year thereafter, Customer shall not recruit or solicit for employment or hire, directly or indirectly, any employee of Verint (except as a result of general recruiting strategies such as placement of advertisements and posting of positions on corporate web sites) without the prior written consent of Verint.

10. Order of Precedence

In the event of a conflict between the Order, the Third Amendment document is the overriding document to which this SOW is attached.

11. Change Order Process

Customer may request changes in or additions to the Services being provided hereunder by completing a change control document. If Verint deems the changes feasible, Verint will provide a quote for any increase or decrease in the cost of or time required for performance of the Services as amended. Once parties agree to the modified scope and related fees a representative of each party will sign a change control document. Verint shall not be obligated to perform any revised or additional Services unless and until a change control document is signed by both parties.

VERINT.

Attachment A: Fixed Fee Services

Milestones under this SOW are provided to Customer on a fixed fee basis and for the fixed fee Services Fee set forth in the Order.

Customer will receive a Confirmation of Services document ("COS") to acknowledge that the Service milestones have been rendered in accordance with this SOW. Customer must accept or reject the requested acknowledgment of completion either by signature or by email within 5 days. In the event Customer fails to accept or reject a COS by the end of the 5-day period, the applicable Service will be deemed delivered complete and accepted.

Implementation Activities

This SOW outlines the responsibilities and milestones necessary for the implementation of the Generic Listener and GUMB integration with EM Professional.

The following sections cover:

- Proposed functionality to be delivered
- Details of the Process Flow
- Project Milestones

Proposed Functionality

The following sections outline the functionality which Verint will deliver for the proposed enhancement

Process Input

The process will be triggered by each of the back office systems (or their respective broker components). The trigger will be an HTTP POST call to a REST service provided by the Generic Listener. The API will expect as a required parameter a unique message ID in the URL.

For example:
        <server>:<port>/event?msgId=30183081

All messages will be stored in the existing GUMB database table and the 'msgId' parameter will allow the Generic Listener to identify a specific message for processing.

Note – in the future it will be possible to send the message directly to the Generic Listener in the body of the REST call. However, this is out of scope for the initial development of the Generic Listener.

The expected sequence of events is as follows:

- Back office system will prepare GUMB message format and insert into GUMB event table. The message ID will be recorded and used in the step below.
- Back office system will notify the Generic Listener of the message ID which was written to the GUMB event table
- The Generic Listener will retrieve the data from the GUMB event table and begin processing the data and updating EM Professional as required.

Process Output

The process will perform the following output operations:

- The Generic Listener will interact with the EM Professional API (FLWeb web services) to update cases as required.
- The Generic Listener will update timestamps in the EM Professional database. This will ensure that dates for case, notes and task actions are reflective of the actual event time in the back office rather than the time when the event was processed in EM Professional.
- The Generic Listener will update the GUMB event table for the record being processed by setting "MsgStatus" to reflect that the message has been processed.

Data Formats

For messages flowing from EM Professional to the back office systems, the existing delimited GUMB message format will be preserved. For messages flowing from the back office systems, through the Generic Listener to EM Professional the message format will be updated to XML format. The entire XML payload of the message will be stored in the "Msg" field of the GUMB events table. The use of XML will provide the following benefits:

- Recognised industry standard – enables easier future extension of integration functionality (e.g. XML widely understood by other systems)
- Easier to transform in to required formats – e.g. for use in Web service calls to EM Professional

- Easier to extra the required fields as data is formatted with named tags
- Format is natively accepted by Process Management

The XML will adhere to the format to be provided by the Customer

Error Handling

The Generic Listener will be built using Verint Process Management. This will mean that any processes may be configured to avail of error handling logic and offers the following functionality:

- Configurable retry attempts – a process can attempt to retry a specific process step from the point of failure (e.g. in the event of connectivity issues with the GUMB database). When a process reaches the maximum configured retry attempts it will fail and can be manually flagged to retry again when the network issue, for example, is resolved. For failed retry attempts it is possible to perform the following actions:
  - Flag the failed record for reprocessing from the point of failure
  - Delete the failed record (e.g. perhaps if the user wants to reprocess the entire process again by triggering the Generic Listener via the REST service)
  - Modify the payload – in the event of a failed process due to data issues (rather than connectivity) the user could modify the payload and then attempt to reprocess.

  Any retry attempts will be performed from the point of failure only. In addition there is no dependency between the processing of one message and another. Process Management will process messages in the order in which they have been received.

  Note – Because retry functionality is used, the asynchronous "/event" channel in Process Management will be used so that the retry does not cause delays in the back office system. The back office system will send the event to the "/event" end point which will immediately return an acceptance even though there may be retries or failures later in the process.

- Error notifications – emails are sent when any errors are encountered by the process. The recipient of the email will be prompted to login and verify each error and action as required.
  - The Customer would like to integrate the error output of Verint Process Management with Remedy however this is out of scope for this enhancement proposal but may be considered at a later date.

The last step in a successful process chain will be the updating of the record in the GUMB event table. The status will be updated to indicate that the message has been successfully processed.

As a final line of resilience, records can be reprocessed through the Generic Listener by:
- Updating the message status of the relevant record in the GUMB event table
- Triggering the REST service with the appropriate message ID.

Detailed Processing Flow

The following sections outlines the intended flow of messages through the Generic Listener.

Process: Trigger and Header Processing

- The process is triggered via an HTTP POST – e.g. /event?msgId=10123456
- The Generic Listener connects to the GUMB Event table and retrieves message if MsgStatus indicates that the message has not been processed previously.
- The message is parsed and a lookup is performed by Process Management which will determine the sub process to run next. The lookup will determine if Process Management should update, reopen, reassign or reclassify the case.
- After processing each message type the sub process Update GUMB will be called to complete the processing of the message.

Sub Process: Update Case Reference

EM Professional supports the persistence of one or more additional references against a case. These may consist of form references or back office references. This sub process checks to ensure that a case in EM Professional is updated with the correct reference from the back office system.

The Generic Listener will process each message as follows:

1. The back office case reference will be extracted from the message payload. The back office system will also provide the EM Professional case reference if available.
2. A search will be performed in EM Professional for the case. The following logic will then be applied depending on the outcome of the search:

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a. If the case exists: Check the case for External References with the correct type (e.g. ECCO, SAPP or CHAM). The following logic will be applied to the external reference:
   i. Case contains external reference – no further action is taken in this sub process
   ii. Case does not contain the external reference – update the case by adding a new external reference with the reference type set to the back office system name (i.e. "ECCO", "SAP" or "CHAM").

b. If the case does not exist (when searching by Case ID) a second attempt to search for the case by Back office reference will be performed (e.g. the "ECCO reference). If the case is found then the case ID matching the back office reference will be used for further processing.

c. If the case does not exist: No further processing of the message takes place. The MsgStatus field of the message in the GUMB Event table will be updated to reflect that the message could not be processed (e.g. by writing a generic error code and a fail reason or by writing a specific error code). If this is a new case it is assumed that an Insert (I) message will be sent by the back office to create the case.

Sub Process: Update (U) Case

Update messages will be generated when the back office system updates or creates (in the case of ECCO) a case. Currently the back office systems utilize different message formats depending on the system. The Generic Listener will assume that an XML formatted message payload will be used with a schema that is consistent across all of the system.

The Generic Listener will process each update message as follows:

- The message is parsed to extract the back office case reference. This is then sent to the Update Case Reference sub-process to determine if the case already contains the back office reference or if it needs to be added.
- The process will run a SQL query against a mapping table to determine how tasks should be updated and to determine if the case should be closed or not. This lookup table will contain columns similar to the following and will be provided and populated by CoSA:
  - Back office system identifier - e.g. CHAM
  - Back office system status – e.g. "Impound", "Resolved" for ACS
  - Flags set against each of the tasks to determine if the task should be closed or not. This will include:
    - Dept_review
    - Case_Accepted
    - Initial_Response
    - Work_Start
    - Work_Complete
    - Final_Inspection
    - Admin_Tasks
  - For each task a flag will be set as one of the following values:
    - "1" – Task should be closed if not already closed
    - "0" – Task should be left open or in the current state
    - "-1" – Task is not relevant to the service area. It is assumed that tasks will be combined into Task Lists in EM Professional configuration and only the relevant tasks added to the process definition for each case type.
    Note – *Additional space will be left in the database table and process configuration for additional tasks in the future.*

    More than one task may also be eligible for closure for each message being processed.

  - Close case – values include "1" case should be closed for this status. "0" case should remain in it's current state for this status.

    Note - *When closing a case, tasks will not automatically be marked as completed. It is expected that if tasks are to be marked as complete they will be flagged in the table structure above in conjunction with the close_case flag.*

- The retrieved task flags and close_case flag will be pass through a decision tree to determine which tasks should be closed and to determine if the case should be closed:
  - Tasks will be closed if the relevant task flag is marked in the mapping table, they exist on the case and they are not already marked as completed
  - The case will be closed if the relevant close case flag is marked in the mapping table and the case is not already closed.

  For each task being completed the completion time of the task will be entered based on the time from the back office system. The back office system will provide an event time which will be used by the Generic Listener. When the case is closed, a closure note and a closure reason will be entered based on the message from the back office system. The case will also be closed using the time stamp provided by the back office system.

- A note will be added to the case if it is provided in the message from the back office system. The timestamp of the note will be updated in the database to reflect the time that the note was written based on the time stamp provided by the back office system. A note may be issued in an update statement which does not require any changes to the case state or the completion of any tasks. Functionality outlined the step above will ensure that notes can be handled without demanding a change of case or task state.

- A case event will be written to the case for each task closure during the update process. The event time will be updated in the database to reflect the time that the event happened in the back office system based on a time stamp provided by the back office system.

Sub Process: Reopen (O) Case

Reopen messages will be generated when the back office system reopens a case. The Generic Listener will process each update message as follows:

- The process will first do a lookup to determine if the case is already open.
- The process will reopen the case with the following parameters:
  - Allocated Queue – the case will be reopened and allocated to the last queue that the case was in prior to closure.
  - Reopen reason – the reopen reason will be entered based on information provided by the back office system.
  - All tasks will remain in the same state that they were in before case closure.
- A note will be added to the case if it is provided in the message from the back office system. The timestamp of the note will be updated in the database to reflect the time that the note was written based on a time stamp provided by the back office system.
- A case event will be written to the case for the reopen event. The event time will be updated in the database to reflect the time that the event happened in the back office system.

Sub Process: Reassign (A) Case

Reassignment in EM Professional is the process of moving a case to a different queue.

- The message is parsed to extract the back office case reference. This is then sent to the Update Case Reference sub-process to determine if the case already contains the back office reference or if it needs to be added.
- The process will first reassign the case to the 311 queue. No other changes will be made to the case details – only the queue will be updated.
- The due date for the case will not be recalculated at this stage. The Customer will build functionality into the form for agents to reassign the case to the correct department's queue. At the same time as this second reassignment, the SLA for the process definition will be added on to the event time of the reassignment message from the back office system to determine the new due date for the case.
- A note will be added to the case if it is provided in the message from the back office system. The timestamp of the note will be updated in the database to reflect the time that the note was written based on a timestamp provided by the back office system.
- A case event will be written to the case for the reassignment process. The event time will be updated in the database to reflect the time that the event happened in the back office system.

Note – A change will be required in the event publisher to handle the ReallocateCaseEvent. The ReallocateCaseEvent will get sent to GUMB when there is a change in queue from 311 to one of the back office queues.

Only a single queue reassignment will be performed per message from the back office system.

Sub Process: Reclassify (C) Case

Reclassification in EM Professional is the process of moving a case to a different case type based on the Subject > Reason > Type classification tree.

- The message is parsed to extract the back office case reference. This is then sent to the Update Case Reference sub-process to determine if the case already contains the back office reference or if it needs to be added.
- The process will first reclassify the case to the new classification as provided by the back office system as follows:
  - If no classification is provided then the message will be diverted to the Reassign Case sub-process to reassign it to the 311 queue. No other changes will be made to the case details – only the queue will be updated.
  - If a classification has been provided, a lookup will be performed against the EM Professional database to determine the event code. The reclassification will then be performed against this new event code. The reclassified case will retain all of the data from the previous classification.
- The due date for the case will not be recalculated at this stage. The Customer will build functionality into the form for agents to reassign the case to the correct department's queue. At the same time as this second reassignment, the SLA for the process definition will be added on to the event time of the reassignment message from the back office system to determine the new due date for the case.
- A note will be added to the case if it is provided in the message from the back office system. The timestamp of the note will be updated in the database to reflect the time that the note was written.
- A case event will be written to the case for the reclassification process. The event time will be updated in the database to reflect the time that the event happened in the back office system.

Note – A change will be required in the event publisher to handle the ReclassifyCaseEvent. The ReclassifyCaseEvent will get sent to GUMB for all classification subjects which relate to the back office systems – no other filtering will be applied. Reclassification will use the form data from the original form despite the classification being different.

Only a single reclassification will be performed per message from the back office system. Form data will not be copied from the original form to the new form during the reclassification process.

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Sub Process: Update GUMB

When the preceding processes have completed successfully, this sub process will run to complete the processing of the message. An update will be made to the GUMB event table to set the "MsgStatus" flag to "DELIVERED" to indicate that the message has been processed successfully.

Additional Services

The following additional services will also be provided by Verint as part of this enhancement change request:

- Skills transfer for Verint Process Management with a focus on the specific implementation for the Generic Listener (including):

  - Introduction to Process Management
    - Process Configuration
      - Configuration GUI, use of process widgets, interface components
      - Toolbar – Pending messages, user controls, process migration and configuration locking
    - Process Test suite
      - How to select a process, test input parameters configured and the process invoked, with full tracing of all the steps
    - Event Mapping
      - Using Event Mapping to "listen" for events that happen and link these to configured processes
    - Scheduling of Processes
      - How to configure different process schedules to occur on a periodic basis e.g. once every 20 seconds, once every hour or be scheduled at a specific date and time.
    - Data Import and Export
      - How to use Verint Process Management for data ingestion (Import) from selected source files.
      - How to use Verint Process Management to trigger exports of data from the system
  - Architecture and Connectivity
    - Basic configuration – Inputs and Outputs
    - Message and Data formats
    - Data persistence and error handling

- Development and completion of developer testing on the implementation of the Generic Listener. Handover of solution to the Customer

- Support during Customer testing including resolution (or implementation of workarounds) for any defects in the agreed functionality

- Deployment of Verint Process Management on up to three environments

- Update event publisher for Reassignment and Reclassification events

Project Milestones

The table below identifies the key Milestones for this project

Milestone	Owner	Estimated Timeline
Project Initiation – Milestone 1	Verint / Customer	TBC
Delivery of Generic Listener to the QA Environment – Milestone 2	Verint	TBC
Completion of Generic Listener UAT- Milestone 3	Customer	TBC
Deployment of Generic Listener to Production for Go Live – Milestone 4	Verint	TBC

Project Initiation – Milestone 1

Verint will provide project management for the Verint responsibilities to provide direction and control of the Verint project personnel and to provide a framework for project planning, communications, reporting, procedural, and contractual activity.

Verint Responsibilities:
- Review Order documents
- Collaborate with the Customer Project Manager to finalize the project schedule with tasks and assignments, associated durations, start and end dates, and predecessors/dependencies
- Assign and schedule Verint resources according to project schedule
- Establish communication methods, status meetings and status reporting
- Maintain RAID (Risks, Action Items, Issues, Defects) tracking log
- Confirm server specifications and pre-requisites for the Verint environments

Customer Responsibilities:
- Assign a Customer Project Manager to act as single contact point for Verint who will be responsible for Customer tasks and personnel
- Prepare and confirm customer tasks, schedule, and assignments and collaborate with the Verint Project Manager to prepare the project schedule
- Assign appropriate application and technical design representatives
- Communicate to Verint any Customer policies and procedures relating to security access and protocols that Verint needs to follow when accessing the Customer environments
- Provide all hardware and infrastructure components for the new environments (i.e., Development, Test/QA and Production)
  - Provide and support access (remote and local) to all servers, databases and systems as required.
    - Administrative user account privileges for all servers and databases
    - File transfer access – this can be either directly or with San Antonio's assistance (e.g. via FTP)
  - Provide and support remote access via a VPN to the Customer system environment. Additional user accounts for the VPN and servers may be required for Verint Technical Consultants.
  - Enable all required network routes within the Verint environment. This includes connectivity from the Verint EM Professional application to third party systems, databases and end user workstations.
  - Configure all firewalls and proxy servers and implementation of security methodologies as stipulated by Customer Information Security policies. Verint will review and agree port numbers for all services with Customer at the time of deployment.
  - Support end user client applications and access.
  - Support all infrastructure, hardware and operating system components during the upgrade.
  - Implement and manage any server backups or maintenance processes as required.
- Provide and support SSL certificates as part of configuration of secure protocols (e.g. LDAPS, HTTPS, IMAPS).

Delivery of Generic Listener to the QA Environment – Milestone 2

This will involve the following Verint tasks:
- Verint will complete the development of the requirements noted in the above section Implementation Activities for the Generic Listener on the Development environment and use case test the solution
- Verint will deploy the Generic Listener solution on the QA environment
- Verint will share our test cases and test results with the Customer for the Generic Listener solution.

Completion of Generic Listener UAT – Milestone 3

This milestone will involve the following tasks:

Verint Responsibilities
- Provide support up to 20 hours of user acceptance testing for a duration of two consecutive weeks during Customer testing
- Review and replicate reported defects that have been validated by the City.
- Address 'break-fix' for confirmed defects

Customer Responsibilities

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- Perform testing activities as detailed in the project plan
- Conduct triage of issues identified during user testing.
  - Maintain an issues log and consolidate issues and remove duplicates.
  - Resolve issues related to configuration and tasks that are the Customer's responsibility.
  - Report validated issues to Verint PM along with logs, steps to recreate, screenshots and any other information that may assist with the replication of the issue).
- Apply defect fixes
- Retest defect fixes
- Work with Verint to create the Go Live Plan
- Complete any performance testing.
- Address issues (including performance) relating to infrastructure, network, hardware, non-Verint software or operating system components

Deployment of Generic Listener to Production for Go Live – Milestone 4

This milestone will involve the following tasks:

Verint Responsibilities
- Deploy the Generic Listener solution to Production and regression test to validate Production environment
- Work with the Customer to create the Go Live Plan

Customer Responsibilities
- Participate in regression testing the solution to validate Production environment
- Work with Verint to create the Go Live Plan
- Facilitate Go-No Go decision
- Conduct Go Live

Task Order Proposal

Cityflag, Inc.

311SA Mobile App

cityflag

September, 19, 2018

Paula Stallcup
311 Program Director
City of San Antonio

Re: Task order request for the City of San Antonio

Customer Name	City of San Antonio	Project Sponsor	Paula Stallcup
Project Name	311 Mobile Apps	Project Manager	Raymundo Vilca
Project Change Authorization (PCA)		Responsible Individuals	Alberto Gómez
Requested By	City of San Antonio	Contact Number	210-789-8942
Estimated Start Date	11/12/18	Project Number	
Estimated End Date	1/21/18	PCA Number	

Description

As part of the local ecosystem of tech companies we are grateful to be able to work with the City of San Antonio. At Cityflag we believe in the importance of public sector innovation, and it is our responsibility to provide you with the highest level of service. As per our previous conversation concerning the request for change in the current 311SA mobile app service, this document includes the work order proposal to address the new tech architecture.

This activity has the following subtasks:
Task #3.3 New Functional Scenario to Create a New Service Request: This tasks includes a change in the current service request process.

Task #4.4 New Requirements for Showing Status: As part of the new upgrade of the existing CRM of the City of San Antonio, additional information related to the status of the service request will be added to the screen display in the 311SA mobile app.

Task #5.3 New Requirements for Associating Customer Profile in Lagan: As part of the new upgrade of the existing CRM of the City of San Antonio, a new service will be build to share user information between CRM and 311SA mobile app.

Completion Criteria
Both operative systems, iOS and Android, of the 311 Mobile app have been successfully tested and approved by COSA in all three environments: Dev, QA, and Production.

Deliverables
All three tasks successfully implemented in both:
- 311 Mobile App iOS
- 311 Mobile App Android

Assumptions
- Assumption #1: Client has a clear understanding of their project needs and the preliminary documentation can be provided in order to be able to gage scope.

Estimated Charges for the Change Authorization
Cityflag will provide an estimated 400 hours of Professional Services for this PCA at hourly rates based on position and roles, as follows:

Estimated Schedule for the Change Authorization
The scope of services described in this PCA is expected to span approximately 6 weeks, or 30 working days.
- The start date for this PCA is TBD.
- The estimated end date for this PCA is TBD.

Tasks*	Estimated days
Task 3.3. New Functional Scenario to Create a New Service Request	$18,148
Task 4.4. New Requirements for Showing Status	$16,789
Task 5.3. New Requirements for Associating Customer Profile in Lagan	$14,470
Total	**$49,407**

Estimated Schedule for the Task Order Authorization

The scope of services described in this PCA is expected to span approximately <6> weeks or 30 working days.

- The start date for this PCA is 11/10/18.
- The estimated end date for this PCA is 1/20/19.

Completion Criteria for the Task Order Authorization

Cityflag will have fulfilled its obligations under this PCA when one of the following first occurs:

- All deliverables listed in this PCA have been provided.

Terms for this Task Order Authorization

Cityflag will provide an estimated 400 hours of Professional Services for this PCA. The estimated total funding requirements for the services is **$49,407**.

City of San Antonio shall make a payment of 50% before the starting date of the project and 50% after the project has been completed.

All other terms and conditions stated in the original Statement of Work dated 2/15/18, unless modified in this PCA, will remain unchanged.

This Project Change Authorization is subject to the terms and conditions of the 311 Mobile Apps Statement of Work. It is agreed that the complete agreement for these services consists of the original Statement of Work, this PCA (and any other approved PCAs), and the Customer Agreement.

Approved by:

Cityflag, Inc. Authorization _____ Date _____

City of San Antonio   _____ Date _____
311 Department Authorization

1. Task #3.3 New Functional Scenario to Create a New Service Request

This would require that:

5. App uses selected category and basic level 1 (and 2) answers from step 1 above to narrow down to a specific service type.
6. App call GIS interface to validate the address:
a. App passes LAT/LONG and Service Type to COSA GIS service
b. COSA GIS service returns the following:
· Input LAT/LONG plus its converted X/Y values
· One or more potential valid addresses with X/Y values for each valid address
· If more than one address is returned, App should display them as a different marker on the map and ask the Citizen to select the location they meant.
· GIS interface could also return a friendly error message, which would then the App would display that message to the citizen

Acceptance Criteria:

- User can select the right address from a set of possible addresses.
- User can go back to switch the selected address.
- User can go back to enter a new address.
- User can't set an address outside of San Antonio boundaries.
- User can see an error messages if the address is wrong.

Validations and Considerations:

- Validate if the GIS service always returns a set of addresses or an error message.
- Validate if the address from GIS corresponds to a valid address on Lagan.
- Validate if the length of the error message fits the mobile screens.
- Consider the response-time of GIS service to display the list of possible addresses.
- Consider the máximum number of addresses responded by GIS and how to display them.
- Consider the response from GIS when the address is an intersection.
- Consider that some users are not going to have the latest version of the 311SA app, which means they should be able to create a new request service by calling the previous version of GIS and Lagan.

2. Task #4.4 New Requirements for Showing Status

This would require that:

- · Cityflag decodes a task status coming from the new LAGAN API.

- · Cityflag database should have a field that will be used to store the new task status(es)
- · Cityflag should also be able to detect from LAGAN API certain codes that would be displayed in the Flag Detail with a Status view.
- · Each case workflow is comprised of the following standardized milestones:
- - Submitted
- - Reviewed
- - Accepted
- - Work Started
- - Displayable action codes that indicate some details about the work being done
- - Work Complete
- The Status view should show the citizen the entire set of milestones and indicate to them where there request in in relation to the entire process.
- · Upon closure of the request, the progress bar would display the outcome/work complete actual status, based on a call to the new LAGAN API.

3. Task #5.3 New Requirements for Associating Customer Profile in Lagan:

Note that changes from existing process are highlighted in yellow below:
1.   User signs up with Name and Email to create an account on the mobile app
2.   User should also be allowed to input phone number, if desired
3.   User is able to select anonymous option during the case submittal process.
4.   If Anonymous is not selected, the App should pass to Lagan the following from the initial sign up for the app:
a.   User Name
b.   User Phone Number
c.   User Email
5.   The App should call the Lagan "Create User Profile API" to associate the submitted case with the User in order to associate the User case submittal with their Customer profile in Lagan, if one already exists. If the User does not have a profile, then the API calls create new Lagan Customer.