SINGLE SOURCE AWARD **BID # SS-0535-18**

Subject: Implementation Services of the Oracle CX Solution

Department: Information Technologies Division

Description of Purchase:
Recommend approval of Single Source Award to Applications Software Technology, LLC. (AST), for the implementation services for the Oracle SaaS Customer Experience (CX) solution for the Information Technologies Division. Period of service will be one year from contract execution, with one (1), one (1) year renewal option. Total requested expenditure not to exceed $1,700,000.00.

Funding for this award to be encumbered by account AFIT53A-069509-ITES01-01, to be executed by formal contract through the Office of General Counsel.

Single Source Award To: Applications Software Technology, LLC.

Price Justification: See Attached

Total Award: $1,700,000.00 **Requisition #** N/A

Attachments: Single Source Form; Recommendation Memo; Vendor Quote; Statement of Work

Certification as to Single Source: Kenneth Lathrop, Chief of Information Technologies Division/CIO

THE ABOVE PURCHASE IS RECOMMENDED FOR AWARD IN ACCORDANCE WITH CHAPTER 126.206.

ANALYST: Chelsey Fleming

Gregory Pease, Chief
Procurement Division

APPROVAL OF GENERAL GOVERNMENT AWARDS COMMITTEE

"ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS"

CHAIRMAN ***DATE***

ACTION OF AWARDING AUTHORITY

DATE: _____

APPROVED_____ **DISAPPROVED** _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

FORM GB-114, Revised 12/2007

SINGLE SOURCE REQUEST

Pursuant to the City of Jacksonville Procurement Code § 126.206 & § 126.312, when requesting a purchase from a vendor subject to the referenced sections, please complete this form to justify your request and submit to Procurement with applicable attachments.

REQUESTING AGENCY (DEPT./DIVISION): Finance and Administration/Information Technologies Division

FUNDING SOURCE: AFIT53A - ITES01-01-069509

BRIEF DESCRIPTION OF GOODS/SERVICES:

Application Software Technology Corporation (AST) implementation services for the Oracle SaaS Customer Experience (CX) solution to replace the ITD developed CARE system (aka CRM - Customer Relationship Management). Discounted licenses for the integrated Oracle CX Solution were acquired as part of the Oracle ERP license contract in April 2018.

AMOUNT OF PROJECT (attach quote): $1,700,000.00

PROVIDE A SUMMARY OF THE SCOPE OF GOODS/SERVICES TO BE PROVIDED; IDENTIFY EACH ITEM, COMPONENT OR SERVICE BEING PROCURED (ATTACH QUOTE/PROPOSAL):

Implementation services include setup of the Oracle CX environment and configuration of the Oracle CX solution to meet the requirements provided by the Neighborhoods - CARE team to replace the current CARE system. The configuration of the Oracle CX system with Cisco UCCX IVR Call Center is included. Once the City places the CX Solution in daily business use, the Information Technologies Division will procure additional quantities of Oracle CX licenses at the Oracle ERP discounted price.

PROVIDE A DETAILED JUSTIFICATION AS TO WHY THE REQUESTED GOODS/SERVICES CAN ONLY BE EFFICIENTLY AND EFFECTIVELY PROCURED THROUGH THE RECOMMENDED SINGLE SOURCE PROVIDER:

After selection as highest scoring vendor for Enterprise Resource Planning (ERP) SaaS Solution/ESC-0549-16, AST is currently on-site implementing the Oracle ERP. Oracle's ERP and CX solutions both utilize configurations, processes and tools that result in a common user experience. AST's knowledge of the COJ ERP Solution and associated business processes places AST in a unique position to best efficiently and effectively implement the integrated Oracle CX solution.

ASSERT THAT YOU HAVE RESEARCHED THE AVAILABILITY OF THE REQUESTED GOODS/SERVICES FROM OTHER SOURCES IN APPLICABLE MARKETS AND HAVE DISCUSSED AND EVALUATED THE SAME WITH COJ'S PROCUREMENT AND EBO DIVISIONS:

The city published an RFI and gathered budgetary quotes for the implementation of a CRM replacement solution. The cost of AST implementation services is in line with the other respondents' quotes. AST's knowledge of the COJ ERP Solution and associated business processes places AST in a unique position to best efficiently and effectively implement the integrated Oracle CX solution.

KEL 7-19-2018

Submitted by: Ginny Zuckero Applications Development Project Manager

(Name) **(Title)**

Date: July 19, 2018

7/19/18

Requesting Agency's Director's Signature:

INFORMATION TECHNOLOGIES DIVISION

CITY OF JACKSONVILLE

07/19/18 15:31:38
Procurement Division

July 19, 2018

To: Greg Pease, Chief of Procurement
Procurement Division

From: Ginny Zuckero, Applications Development Project Manager Ginny Zuckero
Information Technologies Division

Thru: Kenneth Lathrop, Chief of Information Technologies/CIO Kenneth E. Lathrop
Stephanie Burch, Director of Neighborhoods S. Burch

JSP 7/19/18

Subject: Request for Single Source Award for implementation of the Oracle CX solution

The Information Technologies Division (ITD), in conjunction with the Neighborhoods Department, requests approval for a Single Source award to Application Software Technology Corporation (AST) for implementation of the Oracle Customer Experience (CX) solution to replace the current ITD developed CARE system.

In order to support an efficient implementation of Oracle CX (CRM), we request to procure AST implementation services. AST was awarded the contract to implement the Oracle Enterprise Resource Planning (ERP) solution for the City of Jacksonville and is currently on-site. Oracle's ERP and CX solutions both utilize configurations, processes and tools that result in a common user experience. That technical overlap, along with knowledge of City of Jacksonville processes gained through the Oracle ERP project, will enable AST to best effectively implement Oracle CX without negative impact to the ERP implementation project.

Total award for implementation not to exceed: $1,700,000

Attachments:

- SINGLE SOURCE FORM - Oracle CX (CRM)
- Payment Schedule
- Jacksonville 311 Implementation - SOW

Your favorable consideration of this request is appreciated.

CC: Paul Freeman, Enterprise Applications Manager, Information Technologies
John Proctor, IT Manager - Finance
Tom Ossi, Technology Contract and Records Manager

5. Professional Services

Fixed Fee Professional Services Pay Schedule

12-Month Payment Schedule

Implementation Service Fees						
Phase 1 - Oracle CX System - Core Solution						
Stage	**#**	**Deliverable**	**Due Date**	**Recommended Fees**		
				Proposed Invoice	**Proposed Retainage**	**Proposed Net Due**
Definition	P.01	Project Mobilization	Plan	$ -	$ -	$ -
	P.02	Project Kick-off	Plan	$ 50,000.00	$ 5,000.00	$ 45,000.00
	P.03	Project Charter	Plan	$ -	$ -	$ -
	P.04	Project Plan/Schedule	Plan	$ -	$ -	$ -
	P.05	Change Management Strategy	Plan	$ -	$ -	$ -
	P.06	Data Migration Strategy	Plan	$ -	$ -	$ -
	P.07	High Level Reporting Strategy	Plan	$ -	$ -	$ -
	P.08	Preliminary Business Processes Flows Established	Plan	$ -	$ -	$ -
Model	P.09	Change Management and Training Plan Established	Plan	$ -	$ -	$ -
	P.10	Sprint 1 (Conference Room Pilot) Complete	Plan	$ 50,000.00	$ 5,000.00	$ 45,000.00
	P.11	Data Conversion Design Completed	Plan	$ -	$ -	$ -
	P.12	Interface Functional Design Completed	Plan	$ -	$ -	$ -
	P.13	Fit-Gap Completed	Plan	$ -	$ -	$ -
	P.14	Sprint 2 (Conference Room Pilot) Complete	Plan	$ 100,000.00	$ 10,000.00	$ 90,000.00
Verify	P.15	Application Security document prepared	Plan	$ -	$ -	$ -
	P.16	Test Strategy and Plan	Plan	$ -	$ -	$ -
	P.17	System Integration Testing Complete	Plan	$ 100,000.00	$ 10,000.00	$ 90,000.00
	P.18	User Acceptance Testing Complete	Plan	$ 250,000.00	$ 25,000.00	$ 225,000.00
	P.19	Training Plan Created	Plan	$ -	$ -	$ -
	P.20	Training Materials Prepared	Plan	$ -	$ -	$ -
Deploy	P.21	Train the Trainer Training Completed	Plan	$ -	$ -	$ -
	P.22	Go-Live with Oracle CRM	Plan	$ 850,000.00	$ 85,000.00	$ 765,000.00
	P.23	Post Production Support Complete	Plan	$ -	$ -	$ -
	RET	Retention Payout	Plan			$ 140,000.00
Sub total				**$ 1,400,000.00**	**$ 140,000.00**	**$ 1,400,000.00**

Phase 2 - Advanced Features						
Define	P.24	Project Plan/Schedule Updated	Plan	$ -	$ -	$ -
Model	P.25	Change Management and Training Plan Established	Plan	$ -	$ -	$ -
Verify	P.26	User Acceptance Testing Completed	Plan	$ -	$ -	$ -
Deploy	P.27	Train-the-Trainer Training Delivered	Plan	$ -	$ -	$ -
	P.28	Go-Live with Phase 2	Plan	$ 250,000.00	$ 25,000.00	$ 225,000.00
	P.29	Post Production Support for the Phase Complete	Plan	$ 50,000.00	$ 5,000.00	$ 45,000.00
	RET	Retention Payout	Plan	$ -	$ -	$ 30,000.00
Sub total				**$ 300,000.00**		**$ 300,000.00**
			Total for Implementation Services	$ 1,700,000.00		$ 1,700,000.00

All Payment due dates are estimated. The dates will be revised as part of the project plan update.
Deliverable acceptance documents will be presented when the work is completed and
Payment amounts represent a proration of the total amount due by phase and not an

Additional Services Rate Schedule:
For the Calendar years of 2018 through 2020, the following blended rates can be used for any add-on approved CX work.

Blended Hourly Billing Rate * Jan-Dec, 2014	Blended Hourly Billing Rate * Jan-Dec, 2014
$180/hour	Remote Consulting Services
$215/hour	On-Site Consulting Services

For calendar year 2021 and onwards, billing rates will increase 3% annually for the duration of the contract.

Attachment A to Amendment 1 – Statement of Work for Oracle CX Implementation

City of Jacksonville

File Name: Jacksonville 311 Implementation - V13 SOW.docx

Version: 13

Release Date: May 20th,2018

Table of Contents

1. EXECUTIVE SUMMARY 3

1.1 PROJECT SCOPE 3

1.2 PROJECT TIMELINE 3

1.3 GLOSSARY OF TERMS 4

2. SCOPE OF SERVICES 7

2.1 IMPLEMENTATION SERVICES 7

2.2 ORACLE SOFTWARE MODULES 7

2.3 PROJECT METHODOLOGY 13

2.4 INTERFACE DEVELOPMENT 49

2.5 DATA CONVERSION 49

2.6 REPORTING 49

2.7 CUSTOMIZATIONS/MODIFICATIONS 50

2.8 ORGANIZATIONAL CHANGE MANAGEMENT 51

2.9 TRAINING 55

2.10 POST PRODUCTION SUPPORT 56

2.11 APPLICATION RELEASE MANAGEMENT SERVICES 56

2.12 PROJECT CHANGE CONTROL PROCESS 56

3. PROJECT ROLES & RESPONSIBILITIES 57

3.1 CITY'S STAFF ROLES AND TIME COMMITMENTS 57

3.2 AST AND CITY ROLES & RESPONSIBILITIES 60

3.3 PROJECT LOCATION(S) 65

4. PROJECT DELIVERABLE ACCEPTANCE AND ASSUMPTIONS 66

4.1 DELIVERABLE ACCEPTANCE PROCESS 66

4.2 PROJECT ASSUMPTIONS 69

APPENDIX 1 SCOPED INTERFACES 73

APPENDIX 2 SCOPED DATA CONVERSIONS 75

APPENDIX 3 DELIVERABLE ACCEPTANCE CERTIFICATE 76

APPENDIX 4 PROJECT CHANGE CONTROL PROCESS 77

APPENDIX 5 CITY REQUIREMENTS 81

APPENDIX 6 ORACLE CUSTOMER SERVICE AND SUPPORT CLOUD SERVICES DESCRIPTIONS AND METRICS. 224

APPENDIX 7 ORACLE SOCIAL CLOUD – METRICS AND SERVICE DESCRIPTIONS 225

APPENDIX 8 JACKSONVILLE CITY HIGH LEVEL RESPONSIBILITIES BY PROJECT PHASE V3 226

1. Executive Summary

This Statement of Work sets forth the Services and Deliverables that Applications Software Technology LLC ("AST") shall provide to the City of Jacksonville ("City") and includes a description of the scope, Oracle products, implementation services, roles, responsibilities, tasks, payment terms, and timeframe for the implementation of the City's Oracle CX applications. The Statement of Work will be the governing project document outlining project scope as mutually agreed to by both parties.

This Executive Summary section is intended as an overview of the project, scope, and timeline for the City's CRM project. Following the executive summary, the terms of the statement of work are documented in an appropriate level of detail.

1.1 Project Scope

The City of Jacksonville project scope includes the replacement of the City's current CARE CRM system as defined by the City's requirements set forth in Appendix 5 City Requirements. AST will provide all services required to implement the software applications and packages identified in Section 2.2.1 Scoped Software Components, subject to the functionality in the software packages identified in Section 2.2.1 Scoped Software Components. The implementation services provided by AST will include project management, design, configuration, testing, and deployment of the Oracle CX applications. Additionally, AST will provide organizational change management, project team training, and end-user training (train the trainer approach as outlined in this Statement of Work.

1.2 Project Timeline

The Oracle CX solution will be delivered in a dual-phase project effort that follows AST's EDM project methodology across phases. A detailed project schedule will be established at the start of the project.

The following is the preliminary project timeline based on a twelve-month schedule for the two phases of the project.

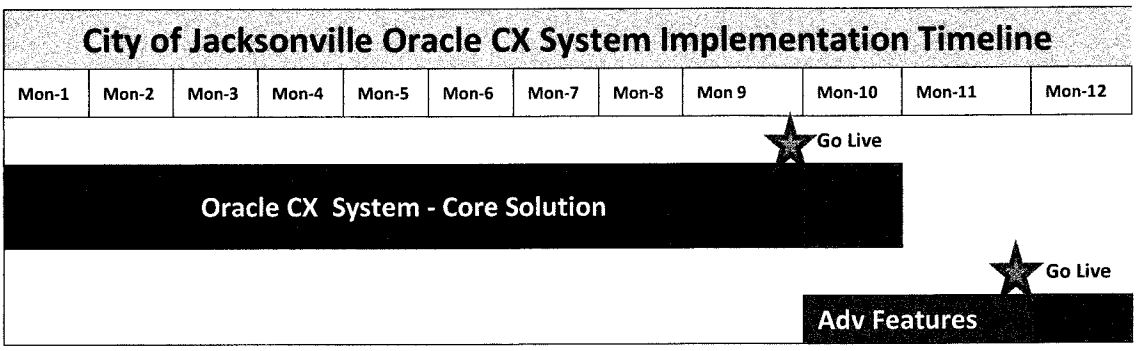


Table 1.2-1 Listing of Modules by Phase:

Phase	Oracle Modules
1 – Oracle CX Core Solution	Implementation of core CX Solution • Cross-Channel Contact Center • Policy Automation • Web Customer Service • Knowledge Management
2-Advanced Features	Enhancement for Advanced Processes • Cross-Channel Contact Center • Policy Automation

1.3 Glossary of Terms

A full glossary of terms for Oracle Service Cloud may be found in the Oracle product documentation glossary.

Table 1.3-1 Terms and Definitions

Term	Definition
Agent Accounts	Accounts used by City employees to access the system. When this term is used, it is in the context of both "Contact Center Users" and "Non-Contact Center Users".
Agent Console	Alternative term for "Dynamic Agent Desktop".
AST	Applications Software Technology LLC
BI	Business Intelligence
Browser UI	The web-based client for Oracle Service Cloud Agent users.
BUI	Acronym for "Browser UI".
Business Rules	Server-side rules that are run after a record is saved in Oracle Service Cloud.
CASB	Cloud Access Security Broker
Categories	Configurable category field for labeling incident records.
Channel	The method in which a contact or agent communicates through Oracle Service Cloud, such as telephone, web, email, chat, etc.
The City	City of Jacksonville
Contact	The record in Oracle Service Cloud that represents a customer or citizen.
Contact Center User	A type of Oracle Service Cloud Agent account that represents a frequent user (more than an hour a day).
CM	Change Management
CM	Cash Management
CoJ	City of Jacksonville
Configuration	Any change that can be made within a SaaS application that does not require lines of source code to be written.
CRP	Conference Room Pilot
CSS	Cascading Style Sheets
CTI	Computer Telephony Integration
Custom Attribute	A configured field in Oracle Service Cloud used to store data that is not out-of-the box. These fields do not count toward a table's column definition limits but cannot be used by business rules. Any field not required by business rules should be a custom attribute.
Custom Field	A configured field in Oracle Service Cloud used to store data that is not out-of-

	the box. These fields count toward a table's column definition limits and can be used by business rules for incident routing, calculations, or other automation uses.
Custom Object	A configured table in Oracle Service Cloud used to store data that is not out-of-the box. Custom Objects are used to build new tables for normalized data that is not a part of the product's object model.
Customer Portal	The customer/citizen-facing web portal that contains standard web pages, authentication, intake forms, knowledgebase, chat, policy automation, etc.
Customization	An enhancement to SaaS applications that requires any source code to be written. Unlike legacy application customization, SaaS customizations are implemented using SDKs or frameworks that define upgradability and compatibility between cloud product versions.
CX	Customer Experience
CX Cloud Applications	Applications within the Oracle "Customer Experience" (CX) suite, which includes all of the applications proposed as part of this solution.
DBA	Database Administrator
DDL	Data Definition Language
DW	Data Warehouse
Dynamic Agent Desktop	The .NET-based "thin client" for Oracle Service Cloud Agent users.
EDM	Enterprise Domain Methodology
Email Templates	HTML or plain text preconfigured templates for automated email generation.
ETL	Extract, Transform, Load
flag	Boolean (yes/no, true/false) fields
GPS	Global Positioning System
IDCS	Identity Management Cloud Services
Incident	Primary record type in Oracle Service Cloud. Synonyms include "case" and "service request".
ISRMP	Information Security Risk Management Plan
IT	Information Technology
ITB	Invitation to Bid
IVR	Interactive Voice Response
Knowledgebase	Module in Oracle Service Cloud used for creating, administering, and displaying knowledge content to contacts and agents for self-service.
Lat/long	Latitude / Longitude
Navigation Sets	Configured sets of icons, dashboards, reports, and features in Oracle Service Cloud that expose functionality for agent profiles.
Non-Contact Center User	A type of Oracle Service Cloud Agent account that represents an infrequent user (more than an hour a day).
OCM	Organizational Change Management
ODI	Oracle Data Integrator
OPA	Oracle Policy Automation
OSvC	Oracle Service Cloud
PCR	Project Change Request
PMIS	Project Management Information System
PMO	Project Management Office
Policy Automation	End-to-end solution for capturing, managing, and deploying complex legislation and other document-based policies across channels and processes.
POV's	Point of Views
Products	A record type in Oracle Service Cloud used to represent products or services that are rendered to contacts.
Profile	Agent account grouping in Oracle Service Cloud that establishes permissions, record assignments, and other capabilities.
RFP	Request for Proposal
RFQ	Request for Quote
SaaS	Software as a Service
SDLC	Software Development Lifecycle
Service Level Agreements	Incident time limits that determine escalation rules in Oracle Service Cloud
SIT	System Integration Testing
Skin	The look and feel given with Customer Portal in Oracle Service Cloud.

SME	Subject Matter Expert
SMS	Short Message Service (Text Messages)
SOA	Service Oriented Architecture
Social Relationship Management	Oracle product used for listening and engaging with customers/citizens over social media channels such as Twitter and Facebook.
SOW	Statement of Work
SQM	Supplier Quality Management
SRM	Acronym for "Social Relationship Management".
SRMSOW	Social Relationship Management
Sessions	Citizen browses through Knowledge Articles, Submits a Question, Chats with Live Agent, or Views Communities Pages, they all are considered a "Session". The Sessions are tracked in 15 minute intervals. If Citizen spends 30 minutes looking through Knowledge Articles, this will be billed as Two (2) sessions.
Task	Record in Oracle Service Cloud that can be assigned to an agent to indicate a to-do item.
UAT	User Acceptance Training
VPN	Virtual Private Network
Web Services	Service offered by an electronic device to another electronic device, communicating with each other via the World Wide Web.
Widgets	Components of reusable HTML, CSS, JavaScript, and PHP code used on Customer Portal that contain features and functionality that can be applied to different templates or pages.
Workflows	A combined set of actions and rules that are configured in Oracle Service Cloud to automate and/or guide agent actions.
Workspace	A configurable canvas in Oracle Service Cloud that is the User Interface for interacting with records.
Workspace Rules	Client-side rules that run when an agent performs actions or selects data types when editing records in Oracle Service Cloud.

All features and functionality of Oracle Service Cloud are provided by Oracle in their online product documentation. A full list of functions supported by the Agent Browser UI are provided through Oracle's knowledgebase.

2. Scope of Services

This section describes the scope of services associated with the implementation of the Oracle CX applications. When completing the work tasks and deliverables identified in this Statement of Work, AST will complete all required tasks and produce all applicable deliverables according to, and comply with, the descriptions, mandated work products, and specific conditions stated within Appendix 5 City Requirements for each task or deliverable.

2.1 Implementation Services

AST shall perform implementation Services necessary to enable the scoped Oracle CX applications to operate in a production environment, including:

- **Project Management:** Establish in coordination with the City the necessary charter, governance, tools, resources, and risk mitigation strategy to create and maintain a Project Management structure including coordination and collaboration with the City project management team.
- **Organizational Change Management:** Involves the development of an Organizational Change Management Strategy, as well as assistance in executing that strategy in support of business transformation.
- **Definition:** Work with key project members to validate and understand project scope, planning, project organization, requirements, and artifacts.
- **Design:** ***System Configuration, Development and Data Conversion*:** Configure, develop and implement business process flows, scoped conversion objects, and scoped application interfaces. Conduct System configuration sprints to validate the business flow requirements.
- **Testing and Final Preparation:** Lead the planning and creation of test plans, and implementation of final testing including system integration and acceptance testing, training, cut-over activities, and readiness plans for go-live steps.
- **Production Go-Live and Support:** To the extent scoped, move the stage or "phase" of users, application managers, systems operation managers and Oracle CX application functions, interfaces and converted data from the pre-production environment to the live production environment, and provide support for the stabilization period.

2.2 Oracle Software Modules

2.2.1 Scoped Software Components

The following table maps the various Oracle products that will be implemented as part of this project to the AST implementation phases outlines in section 2.2.1 Project Methodology.

Table 2.2-1 Oracle Application Phased Implementation Mapping

Phase	Oracle Application
Oracle CX Core and Advance Feature Solution	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service
	Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
	Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
	Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity
	Oracle RightNow Non-Contact Center User Cloud Service
	Oracle Policy Automation Collaboration Cloud Service
	Oracle Policy Automation Agent Cloud Service Collaboration Cloud Service
	Oracle Social Cloud, Basic – Production Environment
	Oracle Social Cloud, Basic – Message Data – 1,000 Messages
	Oracle Additional Test Environment for Oracle RightNow Cloud Service - Test Environment

The following table maps the various Oracle products that will be implemented as part of this project to the functional area in which the products are applicable as part of this project.

Table 2.2-2 City Functional Areas Mapped to Oracle Products

[illegible]	[illegible]
Customer Portal / Web Self-Service	Oracle RightNow Universal Core Service Tier 1 Sessions Monthly Oracle RightNow Universal Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
Omni-Channel Customer Service	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Case Management	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
SLA Management	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Address Management	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
File Attachments	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Search	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Workflow	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Knowledgebase	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
Analytics / Reporting	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Customer Satisfaction	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
Mobile App	(Integration to OSvC) Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service
Mapping / GIS	(Integration to/from OSvC) Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service
Scripting	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Telephony / IVR	(integration w/ UCCX) Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service

Payments	(integration w/ Official Payments) Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Scheduling	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service
Policy Automation and Interviews	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service Oracle Policy Automation Collaboration Cloud Service Oracle Policy Automation Agent Cloud Service Collaboration Cloud Service Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
Social Media Monitoring and Engagement	Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service Oracle RightNow Non-Contact Center User Cloud Service Oracle Social Cloud, Basic – Production Environment Oracle Social Cloud, Basic – Message Data – 1,000 Messages

2.2.2 Implementation Scope

The project scope defined in this section provides AST's configuration deliverables for the City's Oracle CX solution, which will accommodate all items, subject to the functionality available in the Oracle software packages defined in Appendix 5 -City Requirements.

For rows that include a numeric cap on tasks, thresholds include the option to increase these values by up-to 15% without impact to the implementation costs of this effort.

See Glossary of Terms for terms or links to Oracle documentation.

Table 2.2-3 Oracle Service Cloud System Implementation Scope

Oracle Service Cloud (OSvC) Implementation	
i.	Implement the ability to capture and track service requests (incidents) across telephone, email, web (desktop and mobile), mobile app, and SMS channels.
ii.	Configure the ability to identify duplicate service request and contact records.
iii.	Configure anonymous requests.
iv.	Configure workspace and business rules to set incident prioritization.
v.	Configure the ability to provide alert notices to agents via the agent console.
vi.	Configure the ability to display alert notifications on the Customer Portal.
vii.	Configure an email template for email-based alert broadcast notifications via OSvC email marketing functions.
viii.	Configure incident archive rules.
ix.	Configure the ability to route incidents to different departments manually and via business rules.
x.	Configure email templates to control the look-and-feel of automated and manual responses via email.
xi.	Configure outbound SMS notifications to contacts with mobile numbers when an appointment is scheduled (created) or altered by an agent.
xii.	Configure the ability for a contact to set their preferred communications channel.
xiii.	Configure the ability for the City to set limits on the number of appointments that a contact can schedule at any time.
xiv.	Configure the ability to view the waste hauler schedule before scheduling a request.
xv.	Configure the ability to "flag" incidents.

xvi.	Configure default date fields.
xvii.	Implement a custom CTI toolbar with integration to a single version of Cisco UCCX. • The CTI toolbar will provide basic telephony capabilities (answer/dial calls, caller screen pop, and IVR data display). • The toolbar will also provide an interface for administrative users to manage UCCX agent availability functions as provided by the UCCX REST API.
xviii.	Configure OPA interview widget into Service Cloud Customer Portal for citizen interview display.
xix.	Configure Service Cloud-to-Social Relationship Management integration so that social channel service requests can be sent from SRM to OSvC, and then responded to from OSvC.
xx.	Configure SAML SSO for agent profiles. Assist the City's ADFS team configuring Oracle Service Cloud as a SAML 2.0 service provider.
xxi.	Import up-to 5,000,000 total records from a previous CRM system into service cloud (contacts or incidents).
xxii.	Implement inbound SMS-to-Service Cloud incident endpoint (custom OSvC controller or microservice) for inbound Text messages from any service provider.
xxiii.	Implement outbound SMS responses from incident workspace.
xxiv.	Implement "broadcast SMS" UI to allow an agent to select a bulk set of contacts (with mobile numbers) and send the same SMS to those users.
xxv.	Develop, skin/brand, and publish a custom mobile application for citizens for service review and reporting. • The application will enable a citizen to report a new incident with data categorization and input based on the City's required issue types (blight, etc.) using GPS and mapping provided by native mobile device services (Android and iOS) for street/satellite/hybrid views. • View personal incident history • View all "public" requests from the City • View the knowledgebase • Links to open web-based features on Customer Portal or City's website • Contact the City in a non-complaint form. • Mobile maps will be leveraged to allow for users to submit and view requests via geo-location. • Photo and file attachments supported (each file must be less than 20 MB). Performance of upload will depend on file size and user's network connection. • Favorite address feature. • Tap to call the City's contact center phone line • Set personal contact preferences • Display waste/appliance pickup days based on geo-location / address via integration with City GIS REST MapService • Provide reminders for trash, yard waste, and recycling pickup services.
xxvi.	After Customer Portal design work is completed, use City provided W3C-recommended scanners on each interface to verify ADA compliance for the deployed solution.
xxvii.	Payment processing will be integrated into the Customer Portal as part of the OPA interview process. (See OPA section for more details.). Integration will be an outbound integration from OSVC via web services to request the payment process. Results will be returned to the user for display (when applicable) or storage for reference (when applicable).
xxviii.	Develop printer-friendly CSS Styles for Customer Portal web-based payment receipts for citizens.
xxix.	Develop printer-friendly CSS styles for Customer Portal web-based incident summary and thank

	you pages
xxx.	Integrate with the City's master address list for contact address validation using an outbound web-services-based integration from OSvC.
xxxi.	2 Customer Portal interfaces will be skinned with the same look and feel that exists on the City's public website. The interfaces are intended to supply service in English and Spanish languages.
xxxii.	Portal page templates will be configured with OPA widgets for OPA interviews. (Typically, this is the incident request form and a knowledgebase answer page).
xxxiii.	Configure Customer Portal for search across knowledgebase articles.
xxxiv.	Configure Customer Portal feedback widgets for article improvement.
xxxv.	Configure agent knowledgebase improvement suggestion processes during incident management.
xxxvi.	Provide the City's IT team with Service Cloud's syndicated widget code snippets to allow for knowledgebase search on other web properties (internet and intranet sites).
xxxvii.	Configure subscribe/unsubscribe functionality on knowledgebase articles.
xxxviii.	Configure a knowledgebase answer to act as the contact directory for commonly requested non-City agencies.
xxxix.	Configure "thank you" page after incident submission via Customer Portal or OPA forms.
xl.	Configure a flag to indicate if an incident should be visible to the public or if private.
xli.	Configure parent/child relationship between incidents to allow for related incident reports.
xlii.	Configure tasks to manage follow-up and similar task management functionality.
xliii.	Configure audit trails to enable visibility into record changes on incident, contact, and custom object workspaces.
xliv.	Configure email mailing surveys.
xlv.	Configure survey group definitions which can define a static or dynamic set of contacts that can receive surveys.
xlvi.	Configure fields across custom objects and custom attributes that will provide data storage for fields that are not included in Service Cloud out-of-the-box. These fields will define the data points that indicate follow-up requirements, incident details, business area specific information, and other data points that are required to capture service request or incident intake processes.
xlvii.	Configure default values (where appropriate) for custom attributes and/or custom fields.
xlviii.	Configure notes/threads for contact, incident, task, and custom objects (where applicable).
xlix.	Configure agent profiles. Agents will be able to take action in the system based on these profiles, which define permissions. Profiles will have varying access to view/save data, administer the system (edit rules, etc.), send emails, and access APIs.
l.	Configure or import agent accounts.
li.	Configure navigation sets. Navigation sets determine which features are displayed, and what order they are displayed in, to agents that use the system. Navigation sets are assigned by agent profile.
lii.	Configure business rules. Business rules are actions that occur *after* a record is saved in Oracle Service Cloud. Business rules will be responsible for indent routing (based on field data), escalations, and other configured automation requirements that happen after incident save.
liii.	Configure workspaces with workspace rules per workspace. Workspace rules are actions that are taken while an agent is editing a record, such as hiding or showing different fields/tabs/reports based on the type of issue being reported.
liv.	Configure multi-edit workspaces, which will be used for manual batch updates to incident,

	contact, or custom business object records.
lv.	Configure workflows. Workflows are implemented for agents to walk through decision making processes when servicing issues. Workflows are highly configurable, and can change the look and feel of the application, data on the screen, integration(s) with other services, etc.
lvi.	Configure incident Service Level Agreements for incident escalation processes.
lvii.	Configure Standard Texts that will allow automated message population across service channels.
lviii.	Integrate the City's ArcGIS through a browser control in incident workspaces that allows for configuration of the size of the map based on workspace design.
lix.	Configure / integrate the City's ArcGIS system for all mapping display functions for reported incidents such as pin locations of issues, nearby street intersections, buildings, etc. Map zooming, panning, overlays, and other UI functions will be based on support from ArcGIS.
lx.	OSvC will set ArcGIS map center based on lat/long coordinates via URL parameters. ArcGIS will supply pin location information for displaying the 100 most recent incidents around the center point of the map within the field of view of the map. Clicking a pin will present an agent with the option to open the selected incident. OSvC will store lat/long coordinates for each incident in custom attribute fields.
lxi.	The City's ArcGIS through a browser control to display recently closed or transferred service requests near an address entered into the ArcGIS system.
lxii.	Integrate the capability to retrieve GPS coordinates for an address or street intersection through ArcGIS so that those GPS coordinates may be associated to the incident being worked.
lxiii.	Configure custom attribute(s) to allow for storage of an intersection as geo-coordinates as latitude and longitude as supported by ESRI.
lxiv.	Provide incident distinction data for visual cues in ArcGIS to differential request types on a map.
lxv.	Use the native Oracle Service Cloud extension tools to create a frequent/chronic caller configuration that will display a "frequent caller" visual indicator on the incident workspace(s) during agent intake or review.
lxvi.	Integrate with the City's "master address list" to validate that contact and incident addresses entered match data from that database / service. Integration will provide address spelling suggestions (if available).
lxvii.	Integrate with the City's "master address list" to validate that a reported address, intersection, or GPS coordinate is within the boundaries of the City's service area.
lxviii.	Configure up-to three related addresses on the incident object to allow for "reporting address", "problem location", and other address.
lxix.	Configure address entry fields to ensure that data is entered consistently, i.e. street, apt/unit number, city, state, zip.
lxx.	Configure a visual indicator on the incident workspace to indicate if files are attached to the incident.
lxxi.	Configure City branding and logo in agent console.

Table 2.2-4 Oracle Social Relationship Management Implementation Scope

Oracle Social Relationship Management Configuration	
i.	Configure SRM agent accounts and profiles.
ii.	Configure SRM Listen feature to listen on up-to 5 supported social properties and accounts. (Facebook, Twitter, blogs, etc.)
iii.	Configure SRM Feature to filter SRM listen requirements based on filter keywords / hashtags / properties that the City identifies as high-impact social service keywords. Filters will prioritize

	the types of posts that should be reviewed and actioned.
iv.	Configure SRM Engage feature to allow social agents to respond to non-service based social interaction.
v.	Configure SRM Engage feature to allow social agents to send service-based social requests to Oracle Service Cloud.
vi.	Configure SRM for "send to Service Cloud" functions when a social post is service related.
vii.	Configure outbound social post rules.
viii.	Configure social post review routing rules.

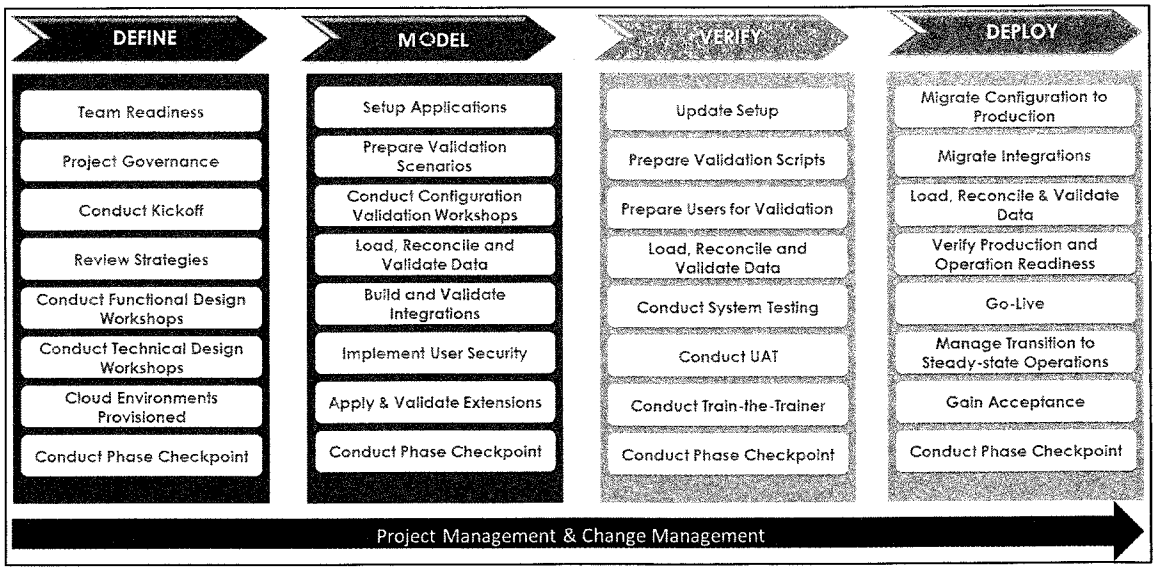
Table 2.2-5 Oracle Policy Automation Implementation Scope

Oracle Policy Automation Configuration	
i.	Configure policy / interview expiration dates.
ii.	Configure default date fields.
iii.	Configure intake forms to display data validation errors when required validation rules are not met.
iv.	Configure the ability to save and resume intake forms.
v.	Configure policy interviews (process scripts) for use by citizens.
vi.	Configure policy interviews for use by agents.
vii.	Configure OSvC workspaces for OPA use where applicable and based on the workspaces defined in OSvC scope above.
viii.	Configure citizen-facing OPA interviews, with monetary collection fields, where required. In interviews where payment is required, and integration will occur with the City's payment vendor (Open Payments) to process the payment for procured services. Upon payment completion (success or failure), callback metadata regarding the payment will be associated to the related incident in Service Cloud.

2.3 Project Methodology

AST will leverage Enterprise Domain Method (EDM) Methodology tailored to suit the cloud-based implementations for the City project. EDM contains Oracle specific templates, methods and scripts that are specific for the Oracle CX system implementation.

EDM methodology will be tailored for the City's specific needs. The following is a graphical view of the overall EDM methodology.



The following sections describe the various stages as part of the EDM methodology.

2.3.1 Stage 1 Define Stage

The goal of the Define Stage will be to complete project planning and project initiation activities as required for laying the groundwork for the project execution stages. A key objective will be achieving a common understanding between AST and the City with respect to how the project will be managed and on the baseline project schedule. The City and AST Project Managers will work together to define and establish the project governance, change management strategy, ``and project charter as well as build an achievable work plan (schedule). Additionally, this stage provides time for the project management staff to prepare for the on-boarding of the project team (e.g. securing work space, network access, lodging, establishing a PMIS, and establishing Oracle system access).

Project Governance

Key deliverables that will result from this stage include the project charter, project schedule, and change management strategy. AST Project Manager will present a draft project charter and schedule to the City for review and discussion; upon reaching agreement, the documents will be presented to the project executive leadership for review. The project charter will document the understanding of how the project will approach organizational / governance structure (roles and responsibilities), scope management, scheduling, resources, team and executive level communications, issue management and risk management. The project schedule will be prepared in Microsoft Project and will present the schedule of activities and estimated durations for each project Phase. Both the charter and schedule will be considered "living" documents, which can be updated with joint agreement as required during the life of the project. To complete the change management strategy the AST Change Management Lead will review the methodology for addressing change with the City and executive leadership with the goal of planning for how the project will holistically address change management activities.

Business Process Analysis

AST functional consultants will lead the Process analysis tasks with participation of key City resources during the Discovery Workshop sessions in the Define stage. Concurrently, technical consultants will review the technical requirements and identify application development

standards which will guide the design and development efforts for integrating, interfacing, and configuring the applications. The technical analysis will include an assessment of the integration and data conversion requirements. All of these will contribute towards defining the work efforts in each Sprint in the Model Phase of the project. The Process flows and the development work will together determine the prioritization of the work during the Sprints in the Model Stage, which will be documented in the Sprint Prioritization Matrix.

The tables below present the activities and deliverables for this stage.

Table 2.3-1 *Define Stage Activities*

AST Define Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Role AST	Role City	City Mapping Activity
Project Management	Prepare Workspace	Ensure a workspace is available for the project team with sufficient work space, conference room space, network connectivity, etc.	Project Manager	Project Manager	Assist	Lead	
	City On & Off-Boarding Procedures Provided	City to provide AST with the requirements (security forms, network access forms, etc..) and procedures for on boarding and off boarding project personnel	Project Manager	Project Manager	Assist	Lead	
	City Project Staffing and SME identification	Identify and staff functional and technical project team members and departmental SMEs (subject matter experts) and assign them to the project as per agreed upon staff participation levels.	None	Project Management	Assist	Lead	
	Project Kickoff	Provide a presentation to all project phase team members, SME's, and executives that highlight the goals, objectives, methodology, and approach for the project.	Project Management, Executive Sponsor	Project Management, Steering Team, City SME's	Lead	Assist	

AST Define Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Role AST	Role City	City Mapping Activity
	Establish Project Management Information Systems	Establish a project management information system (PMIS) for storing documents, team contact information, managing issues (action items and risks)	Project Manager	Project Manager	Co-Lead	Co-Lead	
	Establish PMO (Project Management Office)	AST and City Project Manager will identify the personnel and roles that will staff the PMO and will identify the functions, tools, and techniques that will be utilized to manage the project	Project Management	Project Management	Co-Lead	Co-Lead	
	Project Charter Meetings and Discussions	Meet with the project management and executive level personnel to develop project governance approach: including structure (roles and responsibilities), scope management, communication strategy, and issue management	Project Management, Executive Sponsors	Project Management, Steering Team, Executive Sponsors	Lead	Assist	• Develop Project Charter • Review Project Charter • Develop Project Time Reporting Plan • Develop Weekly Status Report • Develop Issues Management Plan • Develop Risk Management Plan • Develop Project Controls, Standards, and Procedures
	Project Schedule Meetings and Discussions	Gain project management and executive level approval via meetings for	Project Management, Executive Sponsors	Project Management, Steering Team,	Lead	Assist	• Develop Project Work Plan • Manage Project Work Plan and Associated Reporting

AST Define Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Role AST	Role City	City Mapping Activity
		an MS Project schedule that presents project activities, and duration estimates for the specific phase		Executive Sponsors			
	Oversee project activities and perform project management functions	Manage Project Scope, Communications, Schedule, Issues, Resources, Quality	Project Management, Executive Sponsor	Project Management, Steering Team, Executive Sponsors	Co-Lead	Co-Lead	• Conduct Project Team Meetings • Manage Issues • Manage Risks • Manage Project Team Training Plan • Manage Project Controls, Standards, and Procedures • Contractor Team Resource Management • City Team Resource Management • Manage Project Time Reporting • Report to Project Governance
Change Management	Document Change Management Strategy	Work with the City management lead to prepare an overview of organizational change management strategy including approach, communication strategy, sponsorship roadmap, roles and responsibilities	Change Management Lead, Project Manager	Change Management Lead, Project Manager, Executive Sponsors	Lead	Assist	• Develop Project Communications Plan • Develop Initial Organizational Change Management Plan • Develop Project Team Training Plan

AST Define Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Role AST	Role City	City Mapping Activity
	City Change Management Coordination	• Work with City Change Lead to establish the organizational change management strategy • Coordinate with City management to review strategy and their acceptance of the approach • Coordinate with City departments to review unique aspects of their change management challenges • Help define criteria for Change Agents from the departments • Assist with identifying available communication tools • Assist with defining roles and responsibilities	Change Management Lead, Project Manager	Change Management Lead, Project Manager	Lead	Assist	• Manage Organizational Change Management Plan • Deliver Communications • Conduct Periodic Change Management Program Achievement Reviews
Business Process Analysis	Overview workshops	A System Overview will be provided to the City staff using the Oracle demonstration environment. The emphasis will be on demonstrating the overall process flow to City	AST Solutions (Functional and Technical) Team	City Project Team	Lead	Assist	• Deliver Project Team training events • Develop Project Team training materials

AST Define Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Role AST	Role City	City Mapping Activity
		personnel.					
Technical	Interface Strategy	Define Interface approach, scope and plan for the interfaces. Validate listing of incoming and outgoing interfaces and integration touch points to Oracle.	Tech Lead	Tech Lead and Staff	Lead	Assist	• Develop Integration Strategy and Interface Plan Document
Technical	Conversion Plan	Define Data Conversion Plan, scope and strategy and define conversion entities: • Review Data Extract Approach • Review Conversion Reconciliation Strategy • Draft Data Conversion Plan and review with City staff	Tech Lead	Tech Lead and Staff	Lead	Assist	
Business Process Analysis	Identify Business Process Flows for the Design Sprints	• Review the process flows and map them to the City business requirements • Establish preliminary business process flows for Design Sprint sessions	AST Solutions (Functional and Technical) Team	City Team and Functional Leads / Business SMEs	Lead	Assist	• Provide subject matter experts on business process requirements • Develop Business Process, Business Rules, and Roles Design documents • Coordinate City participation in workshops • Conduct business process design workshops

Table 2.3-2 Define Stage Deliverables

	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
P.01	Project Mobilization	Prepare the Consulting Team for the Project	Assemble Project Team and provide Orientation to the Consulting Team	Live Event	Event Complete	
P.02	Project Kick-off	Initiate the Project	Conduct Project Kick-off meeting and provide an overview of • Project Scope • Project Schedule	Live Event	Event Complete	
P.03	Project Charter	Provide guidelines to the project team on project governance and execution.	Document Project Governance Structure. The deliverable material includes: • Project Management Approach • Organization and Roles • Methodology Overview • Issue Management and Escalation Strategy • Monitoring Approach • Change Control Strategy • Risk Mitigation Strategy	Microsoft Word	Completed Document submitted to the City	• Project Charter – • Time Reporting Plan • Status Reporting Plan • Staffing Plan • Issues Management Plan • Risk Management Plan • Project Controls, Standards and Procedures • Status Reports
P.04	Project plan/schedule	Create/Update a project schedule for the project	The deliverable will include: • Project Schedule • Work Breakdown Structure	Microsoft Project	Completed Document submitted to the City	• Project Work Plan
P.05	Change Management Strategy	To outline the approach the Change Management	The deliverable to include: • Define the Change Management Strategy for the project • Define the methods used for	Microsoft Word	Completed Document submitted to the City	• Project Communications Plan • Initial Organizational Change Management Plan

	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
		Lead(s) will use in the project.	managing change including the Change Management methodology • Define "Change Coordinators" Roles • Communication Plan, Sponsorship Roadmap • Define the Roles and Responsibilities			
P.06	Data Migration and Interface Strategy Established	Data Conversion & Interface Strategy	Define data conversion approach and strategy. The deliverable material includes: • Data Conversion Approach • Data Conversion Scope • Conversion Reconciliation Strategy • Interface Approach • Interface Scope • Interface Validation Strategy	Microsoft Word	Completed Document submitted to the City	• Integration Requirements for configured and custom interfaces • Integration Strategy and Interface Plan
P.07	High Level Reporting Strategy	High Level Reporting Strategy	Define reports development approach and the tools to be used to develop reports	Microsoft Word	Completed Document submitted to the City	• Reports Inventory • Reports, Queries, and Forms Strategy Plan
P.08	Preliminary Business Processes Flows Established	Perform Preliminary review of the City business processes flows to enable mapping to the Oracle CX process flows	Review high level City operational processes and map it to Oracle to facilitate design sprints	Microsoft Word	Completed Document submitted to the City	• Business process, Business Rules and Roles Design
D1.01	Application	Orient City staff	Application Module based System	Live Event	Event	• Project Team Training Plan and Needs Assessment –

	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
	Orientation Workshops	with Oracle CX modules in their respective business areas	Overview will be provided to the City staff using the Oracle demonstration environment. The emphasis will be on demonstrating the core business processes to City personnel.		complete	• Training Materials
D1.02, D2.02	Knowledge Transfer Plan	Define the knowledge transfer activities and needs for the City project team	Project Team Training Needs Analysis Project Team Training Plan Project Team Knowledge Transfer Plan, Training material delivered in various forms including; Developed content, reference to on-line material.	Microsoft Word	Completed Document submitted to the City	• Project Team Knowledge Transfer Plan • Development of Knowledge Transfer and Project Team Training Plan
D1.03, D2.03	Configuration Management Plan	Define the process for planning, executing and controlling the configuration of the Oracle Fusion Cloud Applications	Defining the configuration management process	Microsoft Word and Excel Documents	Completed Document submitted to the City	• Configuration Management Plan • Project Team Training on Configuration Tools and Processes • Internal Controls Review Strategy

2.3.2 Stage 2 – Model Stage

The goal of the Model stage is to design an Oracle CX solution to meet the City's business process flows as identified in the previous stage. AST staff will lead the design tasks with participation of the City's project management, Project Leads, and departmental subject matter experts (SMEs). The project team will follow an applications-based process design approach. Additionally, the data conversion and integration requirements with existing legacy/third party systems will also be reviewed and documented.

During the Model Stage, facilitated Sprint Workshops in the form of two iterative Sprints based upon the concept of Fit-To-Standard will be conducted. The sprints focus on first delivering necessary functionality to meet the needs of the business within a required time box. Each Sprint is a distinct set of activities conducted according to the Sprint's plan. Each subsequent Sprint increases the richness, comprehensiveness, and consistency of the solution. The scope of each sprint will be determined by the Sprint Prioritization Matrix in advance of the Sprints in this stage. This matrix will be created in conjunction with the City team to define the topics to be demonstrated in each Sprint including the appropriate data, workflows, etc. The matrix will be updated after Sprint 1 as needed. Specific components for integrations, conversions and configuration at each sprint will determine the work involved.

Based on the configuration plan and steps initiated in the Define Phase based on information provided by the City Functional Leads, AST Consultants will configure the applications for the Sprints. The configuration efforts are progressive, and AST Consultants and their City counterparts can jointly define the extent of the configuration and process flow demonstration needs.

The technical team will focus on developing functional specifications for the scoped technical objects including data conversion, interfaces and custom reports.

While designing solutions, the organizational changes, process improvement initiatives will be considered. The Change Management team will identify areas where process change will impact the City and will proactively communicate these expected changes. Additionally, if resistance to change is identified that is impacting the project schedule or that will impact future system capabilities, the change management team will elevate these concerns. AST Change Management Lead will work with the City's counterpart to establish a Change Management Plan which will meet the City specific requirements.

The activities and deliverables for this stage are:

Table 2.3-3 Model Stage Activities

AST Model Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
Project Management	Oversee project activities and perform project management functions, including preliminary planning for Adv procurement roll-out in Phase 1.	Manage Project Scope, Communications, Schedule, Issues, Resources, Quality	Project Management Executive Sponsor	Project Management, Steering Team, Executive Sponsors	Co-Lead	Co-Lead	• Conduct Project Team Meetings • Manage Issues • Manage Risks • Manage Project Team Training Plan • Manage Project Controls, Standards, and Procedures • Manage Compliance with Information Security Risk Management Plan • Contractor Team Resource Management • City Team Resource Management • Manage Project Time Reporting • Report to Project Governance • Manage Project Communications Plan
	Maintain Project Schedule	The schedule will be updated to reflect progress and completion of activities, resource allocations, and estimated task durations	Project Manager	Project Manager	Lead	Assist	• Manage Project Work Plan and Associated Reporting
	Maintain Project Charter	As required to document changes in PMO functions and	Project Manager	Project Manager	Co-Lead	Co-Lead	

		changes to the project management approach, the charter will be updated with joint approval from the AST and City Project Managers					
	Schedule Sprint Sessions	Coordinate the scheduling of Sprint sessions to ensure proper SME representation	Project Manager	Project Manager	Assist	Lead	
Functional	Sprint1/2 (Conference Room Pilot)	Perform City-specific base/shell high level configuration of the Oracle CX modules to: • Demonstrate standard flows with reference to the preliminary flows established. Sprint-1 would be a demo of high level functionality to assist with solution design and not a working solution. All issues identified will be reviewed for consideration in the next round of Sprint.	AST Functional Leads	City Functional Leads, City Project Team	Lead	Assist	• Configure Applications • Review and Validate Configuration • Verify Expected City Functionality
	Conduct Fit/Gap Analysis	The Gaps between the Oracle system functionality and City business requirements will be identified and options will be identified (e.g. manual work around, updated high level process flow). The City will select the option desired.	Functional Leads	City Functional Leads	Lead	Assist	• Develop Reports Inventory • Develop Business Process Gaps Inventory
Technical	Provision Oracle CX Application Environments	Coordinate with Oracle to provision CRM environments	Tech Lead	Tech Lead	Lead	Assist	

		required for sprints					
	Conversion Design	Data Conversion design would be one consolidated document per phase which will include design components, including: • Conversion Description • Functional Setup Prerequisites including ➢ Volume Considerations • Data Mapping • Data Cleansing • Data Extraction and transformation	Tech Lead	Tech Lead and Tech Staff	Lead	Assist	• Design and document Data Mappings • Provide Subject Matter Experts for legacy system data
	Reports Design	Define Reporting Design Components for the applications included in scope including • Listing of Reports • Functional Need • Reporting Tool to be deployed	Functional and Technical Team	City Functional Leads, City Project Team	Lead	Assist	• Create Reports, Queries, and Forms Strategy and Plan • Reports, Queries and Forms Inventory, Disposition, and Prioritization • Reports, Queries and Forms Design • Reports, Queries and Forms Design Review
	Interface Design	One Interface design document per object will be created. It will define design components, including: • Description of components • Source and target Systems • Functional Setup Prerequisites including ➢ Business Rules (If Any) ➢ High Level Process Flow • Technical Approach (Does not include pseudo code) • Application Column Mapping	Tech Lead	Tech Lead and Tech Staff	Lead	Assist	• Develop Integration Requirements and Design Document

		for Oracle applications					

Table 2.3-4 Model Stage Deliverables

Model Stage Deliverable Number	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
P-09	Change Management and Training Plan Established	To outline the approach the Change Management and Training Lead(s) will use in the project.	The deliverable topics include: • Document Change Management Plan & Steps • Document the Training Strategy and Approach • Identify Communication Methods and Plan • Define Feedback Strategy	Microsoft Word	Completed Document submitted to the City	• OCM Plan • Communications Plan • Coaching Plan • Change Readiness Assessment Reports
P-10	Sprint 1 (Conference Room Pilot) Complete	Demonstrate standard functionality to gain consensus on solution design, software fit, and potential functionality gaps.	Perform City-specific base/shell configuration of the Oracle CX modules to: • Demonstrate standard process flows as per the sprint plan.	Live Event	Event complete and all design issues documented and reviewed with the City.	N/A
P-11	Data Conversion Design Completed	Define Functional Requirements for data conversions	Data Conversion design would be one consolidated document per strategy which will include design components, including: • Conversion Description • Technical Approach • Conversion Column Mapping for all data conversion entities	Microsoft Word	Completed Document submitted to the City	• Completed Data Conversion Plan
P-12	Interface	Define Functional	Define design components,	Microsoft	Completed	• Integration Strategy and Interface

Model Stage Deliverable Number	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
	Functional Design Completed	Requirements for Interfaces	including: • Interface Description • Technical Approach (Does not include pseudo code) • Application Column Mapping for Oracle applications	Word	Document submitted to the City	Plan
P-13	Fit-Gap Completed	Document CX Process Fit and Gaps	Map the City's Business Requirements to the Oracle CX system and identify Gaps in Software functionality • Gap Analysis • High Level solution options/ work around for Gap solution	Microsoft Word	Completed Document submitted to the City	• Software Gap Analysis Report • Business Process Gap Analysis Report
P-14	Sprint 2 (Conference Room Pilot) Complete	Further Validation of the Solution Design though demonstration of standard Oracle CX functionality.	Re- configuration of the Oracle CX applications for the phase based on the feedback from Sprint 1. Review of solution approach to include the following: • Validate the solution decisions that have been made • Continue to work through design and solution for any open flow Items • Gain sign-off on key design decisions Sprint 2 would be a demo of high level functionality to refine the solution design and not a working model. All issues identified will be reviewed for consideration in the	Live Event	Event complete and all design issues documented and reviewed with the City.	N/A

Model Stage Deliverable Number	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
			design and incorporation into next round of testing			

2.3.3 Stage 3 – Verify Stage

The goal of the Verify stage is to validate that the Oracle CX solution for the specific phase will meet the City's business flow requirements. The testing focus will be towards validating business flows and requirements that map to the City's business needs and not on standard capabilities provided by the Oracle CX solution.

AST will lead the effort in creating the testing strategy and test plan to validate the business process flows. AST will assist the City Team / Functional Leads and Business SMEs in writing test scripts to verify all business tasks they perform on a day-to-day basis. The functional traceability matrix will be used to ensure that all process flows are fully tested.

The primary testing events include unstructured unit testing by the Project team, and structured System Integration Testing (SIT), and User Acceptance Testing (UAT). AST will prepare a testing strategy and plan document to detail the scope and objectives of the various testing events. The Project Management Office will track the progress of the testing events. The technical team will coordinate with Oracle in provisioning the applications in the testing environment and AST functional leads will configure the applications. System Testing will be led by AST and will validate the designed process flows. Available custom components (data conversion, integration, custom reports) will also be tested. User Acceptance Testing (UAT) event will be led by the City team. The UAT will be an abridged version of the system integration testing to finally validate that the system meets the City's business needs. A preliminary GO/NO GO decision will be made based on the results of UAT.

Training

AST shall develop City specific role-based training material using MS Office. The functional and training team members will document the scoped Oracle system business processes as appropriate for each phase go-live. These training materials will be available for City functional and training team members to add appropriate Policy and Procedure related end user documentation. End user training delivery will be executed by the City staff. AST will prepare the City training staff by conducting train the trainer activities in advance of end user training. Training needs will be assessed in terms of the breadth of the user community that requires training for a given topic, and decisions will be made as to the most appropriate training delivery mechanism.

The activities and deliverables for this stage are:

Table 2.3-5 Verify Stage Activities

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
Project Management	Oversee project activities and perform project management functions	Manage Project Scope, Communications, Schedule, Issues, Resources, Quality	Project Management Executive Sponsor	Project Management, Steering Team, Executive Sponsors	Co-Lead	Co-Lead	• Conduct Project Team Meetings • Manage Issues • Manage Risks • Manage Project Team Training Plan • Manage Project Controls, Standards, and Procedures • Manage Compliance with Information Security Risk Management Plan • Contractor Team Resource Management • City Team Resource Management • Manage Project Time Reporting • Report to Project Governance
	Maintain Project Schedule	The schedule will be updated to reflect progress and completion of activities, resource allocations, and estimated task durations	Project Manager	Project Manager	Lead	Assist	• Manage Project Work Plan and Associated Reporting
	Maintain Project Charter	As required to document changes in PMO functions and changes to the project management approach, the charter will be	Project Manager	Project Manager	Co-Lead	Co-Lead	N/A

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		updated with joint approval from the AST and City Project Managers					
	Develop Application Security Document	Identify Application Roles and Responsibilities	Project Manager/ Functional Leads	Project Manager/ Team/Functional Leads	Lead	Assist	• Provide current City security policies to include details regarding what data the City considers confidential and sensitive • Develop Security Plan, with configuration for resource groups, security roles, user profiles, data level security, infrastructure and sensitive data • Review Security Plan and Security Configuration
	Monitor Custom Development Completion	Project Management will track the progress toward completion of the scoped development objects and the progress through design, build, and unit test.	Project Manager	Project Manager	Lead	Assist	• Management reporting and deployment tracking of production interfaces

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
Functional	Unit Testing of application Modifications, Interfaces, Conversions, and Data Warehouse	Project team members will assist in unit testing by providing informal test scenarios and by validating module-based results	Functional Leads/ Tech Staff	Functional Leads/ Tech Staff	Lead	Participate	• Real-time and batch Interface development and unit test: Extracts from legacy and external systems and load processes to legacy and external systems • Real-time and batch Interface development and unit test: required transformation and load processes to the SaaS System Solution software, and extracts from the SaaS System Solution software
	Identify Final Test Scenarios	Provide real life examples linked to end user requirements for use in the SIT and UAT testing cycles	Functional Leads	Functional Leads	Assist	Lead	N/A
	Create Test Scripts	Create test scripts as per testing strategy/plan based on City provided scenarios. Test Scripts are to be based on process flows and shall be consolidated to be able to be executed as per the testing schedule	Functional Leads	Functional Leads	Lead	Assist	• Provide sample test scripts (based on City designed business processes) and lists of scenario topics developed from other projects • Develop system test scripts (based on City designed business processes) for forms, reports, interfaces, conversion components, enhancements and workflows • Develop system test scripts (based on City designed business processes) for interfaces and conversion components developed by the City • Develop integration test scripts (based on City designed business processes) • Provide examples of test scripts (based

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
							on City designed business processes) and lists of scenario topics developed from other projects • Develop UAT scripts
	Configure System Integration Testing Environment	The system integration environment will be configured with the module specific application configuration (design)	Functional Leads	Functional Leads	Lead	Assist	• Verify Application Security Configuration • Upload Security Templates
	Configure User Acceptance Testing (UAT) Environment	The user acceptance testing environment will be configured with the configuration settings. A gold copy of the instance may be used to re-use SIT configurations	Functional Leads	Functional Leads	Lead	Assist	• Set-up the UAT environment, submit batch jobs, perform backups, restore databases, and execute data conversion loads as reasonably required to support acceptance testing • Maintain user profiles and security configuration for UAT testers
	Conduct System Integration Testing	AST led Pass / Fail testing event. Validate Business Process flows, Test available custom components and	Functional Leads	Functional Leads/ Business SMEs	Lead	Assist	• Develop System Test Plan • Test forms, reports, interfaces, conversion components, work around development, and work flows • Test interfaces and conversion components developed by the City • Perform issue resolution for forms,

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		document results					reports, interfaces, conversion components enhancements, and work flows • Perform issue resolution for interfaces and conversion components developed by the City • Execute integration test • Perform issue resolution for forms, reports, interfaces conversion components, enhancements, and work flow • Perform issue resolution for interfaces and conversion components developed by the City • Monitor and report results
	Conduct User Acceptance Testing	City led Pass / Fail testing event. Validate Business Process flows, Test Interfaces and other custom components, and document results	Functional Leads	Functional Leads/ Business SMEs	Assist	Lead	• Develop User Acceptance Test Plan • Provide UAT Tester training (AST Lead) • Execute UAT • Support UAT Testers (AST Lead) • Provide issue resolution for forms, reports, interfaces, conversion components, enhancements, and work flows (AST Lead) • Provide issue resolution for interfaces and conversion components developed by the City • Monitor and report results (AST Lead) • Manage and track status of activities (AST Lead)
	Finalize Configuration Documentation	The module configuration	Functional Leads	Functional Leads	Lead	Assist	• Update software application documentation with configuration

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		documents will be finalized with the agreed and accepted configuration per UAT testing					
Technical	Develop Data Conversions	Develop custom data conversion components as per the design	Tech Staff	Tech Staff	Co-Lead	Co-Lead	• Extract data from legacy system (City Lead) • Create data conversion programs (AST Lead) and associated crosswalks (AST/City Lead) • Execute mock data conversion testing (AST/City Lead) • Validate quality and accuracy of converted data from mock data conversion testing (City Lead) • Perform data cleansing (City Lead) • Perform manual conversion of data (including non- electronic data) and crosswalks (City Lead)
	Initiate development of Approved custom reports	Tech staff starts working on approved custom reports	Tech Staff	Tech Staff	Lead	Assist	N/A
	Technical Knowledge Transfer	Review custom object technical design (interfaces and reports) with the City technical team members.	Tech Staff	Tech Staff	Lead	Participate	• Interface Knowledge Transfer Document Development • Training of City project team resources on integration platform (if applicable) Training of City support personnel for major interfaced systems
	Perform Unit Testing	Unit test custom	Tech Staff	Tech Staff	Lead	Participate	N/A

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
	of Custom Objects	objects with sample data before migrating to System Integration Testing					
Change Management	Execute Change Management Plan Activities & Communication	Conduct organizational outreach, resistance identification, process change identification, liaison with executive leadership regarding process changes and status, town hall communications, etc.	Change Management Lead	Change Lead, Change Coordinators, PMO	Assist	Lead	N/A
Training	Create Training Plan	Create an end-user Training Plan based on City role-based training requirements	Training Lead	Training Lead	Lead	Assist	• Develop End-User Training Strategy and Plan • Develop Training Sustainment Plan
	Conduct Train the Trainer Sessions	AST functional team members will conduct internal training sessions with the	Functional Leads	Functional Leads/ Trainers	Lead	Assist	N/A

AST Verify Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		City training leads in order to prepare them for conducting end user training. The training would be up to one classes per application area based on training material.					

Table 2.3-6 Verify Stage Deliverables

AST Verify Stage Deliverable Number	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
P.15	Application Security document prepared	Develop Application Access Security Document	Deliverable includes: • Identification of Application Roles and Responsibilities to be assigned	MS Word	Completed Document submitted to the City	• Role Definition and Role Assignment Review Report
P.16	Test Strategy and Plan	Create Testing Strategy and Plan for the phase	The Test Strategy and Plan includes: • Testing Approach & Strategy • Testing Instance • Testing Responsibilities It is an approach and plan document to be completed prior to start of system test	Microsoft Word	Completed Document submitted to the City	• Completed Test Plans for Unit, System, Integration, Parallel User Acceptance and Security Testing
D.02	Test Scripts Prepared	Create test scripts as per plan based on City provided	Develop City specific test scripts as per the testing plan for the applications being deployed in the	Live Event	Completed Document submitted to the	• Completed Test Scripts for Unit, System, Integration, Parallel and Security Testing

AST Verify Stage Deliverable Number	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
		scenarios	phase. The test scripts that are prepared for System testing will form the basis for UAT as well.		City	
P.17	System Integration Testing Complete	Plan and execute System Integration Testing	Execute System Process flows. Test scripts will be executed manually, and no automated tools are proposed. The deliverable material includes: • Perform System Integration Testing according to Plan using Test scripts • Validate Business Process flows • Test Interfaces • Validate end to end converted data • Validate results The completion criteria are the execution of all planned testing and documentation of the results for retesting in the next round of testing	Live Event (Online Testing)	Event complete and all testing issues documented and approved as acceptable by the City All major issues are retested. If an issue requires a configuration change, it can only be done in the next instance and therefore a plan of action is created to unit test with the City before the formal UAT sessions.	• Completed Conversion Programs and Crosswalks • Successful Completion of End to End Conversion of Test Runs • Test Results Review for Internal Controls Report
P.18	User Acceptance Testing Complete	Plan and execute User Acceptance Testing	Execute System Process flows as per plan. Scripts will be executed manually, and no automated tools are proposed. The deliverable material includes:	Live Event (Online Testing)	Event complete and issues documented. All critical issues resolved or a City	• Successfully Completed Tested Tests for Unit, System, Integration Testing • Completed User Acceptance Testing Assistance • Successful Completion of End-to-End

AST Verify Stage Deliverable Number	Deliverable	Objective	Description of Deliverable	Format	Completion Criteria	City Deliverables
			• Perform User Acceptance Testing according to Plan using Test scripts • Validate all the City Business Processes • Test Interfaces • Validate results The completion criteria are execution of all planned testing and closure/work around for all critical issues.		acceptable plan of resolution available	Conversion Test Runs
P.19	Training Plan Created	Create End User Training Plan	Conduct End User Training Needs Assessment and prepare a Training Plan	Microsoft Word	Completed Document submitted to the City	• End-User Training Strategy • End User Training Plan • Training Sustainment Plan
P.20	Training Materials Prepared	Prepare training materials	The deliverable material includes: • Create Role based training material for each of the application modules being implemented in the phase	Microsoft Word /Online Tutorial	Training Materials for the software components created and made available to the City for review	• End User Training Materials

2.3.4 Stage 4 - Deploy

The goal of the Deploy Stage is to plan and execute the production migration of the Oracle CX application modules included in that phase. Once the project team has validated production readiness, AST shall lead the tasks of creating and managing a production cut-over plan, installation of the applications in the production environment, configuration, and final data conversion. The City staff will assist with these tasks and take the lead in performing final system validation before production go-live. The City shall also ensure that all the stakeholders are informed of the production cutover. The City project management will make a final decision on the go- live based on user validation. Additionally, AST will work with the City to prepare the help desk with associated escalation processes. AST will assist the City functional and technical team members in triaging help desk requests as required post go-live.

Once the applications are live in production, AST shall provide the required level of post-production support.

Training

AST will utilize the train the trainer packets to train the City team members that will be conducting the end user training sessions. The City, with assistance from AST will conduct end-user training per the end-user training plan created in Stage 3.

The activities and deliverables for this stage are:

Table 2.3-7 Deploy Stage Activities

AST Deploy Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
Project Management	Oversee project activities and perform project management functions	Manage Project Scope, Communications, Schedule, Issues, Resources, Quality	Project Management, Executive Sponsor	Project Management, Steering Team, Executive Sponsors	Co-Lead	Co-Lead	• Contractor Team Resource Management • City Team Resource Management • Manage Project Time Reporting • Report to Project Governance • Conduct Project Team Meetings • Manage Issues • Manage Risks • Manage Project Controls, Standards, and Procedures • Manage Compliance with Information Security Risk Management Plan
	Maintain Project Schedule	The schedule will be updated to reflect progress and completion of activities, resource allocations, and estimated task durations	Project Manager	Project Manager	Lead	Assist	• Manage Project Work Plan and Associated Reporting
	Maintain Project Charter	As required to document changes in PMO functions and changes to the project management approach, the charter will be updated with joint approval from the AST and	Project Manager	Project Manager	Co-Lead	Co-Lead	N/A

AST Deploy Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		City Project Managers					
	Develop and Monitor Production Cutover Plan	A production cutover plan will be developed to identify the sequence of activities required to migrate from the Legacy application to the Oracle system. Periodic meetings will be held to track progress to the plan through Go Live.	Project Manager	Project Manager	Lead	Assist	• Develop Cut-over Plans • Develop Cut-over Checklists • Execute Cut-over Plan for ERP software components • Execute Cut-over Plan for components owned by the City (City Lead)
	Establish Help Desk	Plan for the transition to the Oracle applications by establishing Help Desk approach and procedures	Project Management	Project Management	Assist	Lead	• Create Service Desk and Support Strategy (AST Lead) • Develop Service Desk Procedures • Provide service desk infrastructure and tools for service management activities • Manage Service Desk
	Make Go-No Go Decision	Review status of testing and preparedness of the applications and the organization to Go-Live. A decision is required from the City to proceed with go-live	Project Management	Project Management, Steering Committee, Executive Sponsor	Co-Lead	Co-Lead	N/A
Functional	Perform Production Cutover Activities	Perform production cutover activities including configuration, data load and	Functional Leads	Functional Leads/ Business SMEs	Lead	Assist	• Execute Cut-over Plan for ERP software components

AST Deploy Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		other tasks. Assist in verification of production conversion					
	Help Desk Monitoring	Support and triage help desk calls post Go Live	Functional Leads	Functional Leads/ Business SMEs	Assist	Lead	
	Post Production Support	Support functional activities post Go Live as required by the City	Functional Leads	Functional Leads/ Help Desk	Co-Lead	Co-Lead	
Technical	Migrate Custom Objects to production	Migrate approved custom objects to production environment	DBA/Tech Staff	DBA/Tech Staff	Lead	Assist	• Execute production conversion processes
	Support Cutover Activities	Support cutover activities. Assist in verification of production conversion	Tech Staff	Sys Admin/Tech Staff	Co-Lead	Co-Lead	• Validate quality and accuracy of data from production conversion processes
	Provide Post Production Support	Support functional activities post Go Live as required by the City	Tech Staff	Sys Admin/Tech Staff	Co-Lead	Co-Lead	• Provide new release analysis, testing, training, and other services required for a successful upgrade
Change Mgt & Training	Provide Internal Go-Live Communications	As part of cutover planning, define key cutover communications for departmental and end user personnel. Distribute communications per the	Change Management Lead/Project Management	Change Management Lead/Project Management	Assist	Lead	N/A

AST Deploy Stage Function	Key Task / Activity	Description	AST Resources	City Resources	Primary Role		City Mapping Activity
					AST	City	
		cutover plan					
	Provide External Go-Live Communications	Plan for communications to City external stakeholders (Vendors, Customers etc.) regarding the new functionality provided	Change Management Lead/Project Management	Change Management Lead/Project Management	Assist	Lead	N/A
	Develop Training Material	Develop various training materials including end user training and knowledge transfer topics.	Functional Leads/Training Lead	Functional Leads/Training Lead	Lead	Assist/Review	• Develop Training Materials
	Conduct End User Training	City Training Leads will conduct end user training sessions (AST to assist with leading the first session for each training course)	Functional Leads	Functional Leads/ Trainers	Participate	Lead	• Populate training environment with City-specific data and initial transaction data to support training delivery and user scenarios, if needed based on training strategy

Deploy Stage Deliverables:

Deploy Stage Deliverable Number	Deliverable	Objective	Description of Scope	Format	Completion Criteria	City Deliverables

Deploy Stage Deliverable Number	Deliverable	Objective	Description of Scope	Format	Completion Criteria	City Deliverables
D-04	Deployment Plan	Create Production Deployment and Support Plan	Develop Cutover Plan including • Deployment Cut-Over (Go-Live) Plan • Production Cutover (Go-Live) Checklists, • Service Desk and Support Strategy • End-User Support Procedures	Microsoft Word Document(s)	Completed Document submitted to the City	• Service Desk and Support Strategy • Deployment Cut-Over (Go-Live) Plans • Production Cutover (Go-Live) Checklists • End-User Support Procedures
P-21	Train the Trainer Training Completed	Completed Train the Trainer Training	AST to deliver training to the City Trainers to prepare them for the execution of the End User Training Plan by City Trainers	Live Event	Completion of the planned train the trainer training	• Trained End Users on Reports • Integration Platform (if applicable) and Interface Training of City Personnel on Use and Support • Delivered End User Training
P-22	Go-Live with CX Phase	Production Go-Live	The deliverable material includes: • Production Configuration Complete • Production Data Conversion Complete • User Verification of the System Complete • Production System made available to user	Live Event	User complete system validation and authorized production go-live and the system is made available to the users in the production environment	• Configured Application Software • Updated Documentation to support configuration • Successfully Converted Data into Production Environment
P-23	Post Production Support Complete	Completion of post-production support	Production Support and stabilization services	Microsoft Word Document(s)	Production Support for the specified	• Ongoing Operations Knowledge Transfer Plan

Deploy Stage Deliverable Number	Deliverable	Objective	Description of Scope	Format	Completion Criteria	City Deliverables
			delivered for the required period of time. Includes finalization of all On-Going Support documents and activities	and Live Event	period complete	• Ongoing Operations Training Plan and Needs Assessment • Training Materials – • Satisfactorily-Delivered Ongoing Operations Training

Description/meaning of the key activity responsibility levels

Lead	The party that is responsible for performing the task and performing majority of the work.
Co-Lead	The parties shall share responsibilities for performing the tasks and work.
Assist	The parties assist in actively creating part of the Deliverable or performing the activity

The designated City users shall be made available during the project for the interview, system demonstrations, system testing, decision-making, and other tasks related to this project.

2.4 Interface Development

AST shall lead the design and development of scoped interfaces, with the assistance of the City, as identified in Appendix 1 (Interface Scope) of this Statement of Work.

AST shall be responsible for developing the Oracle CX portion of the interface and the City shall lead the work effort on the third party/legacy system components. Roles and Responsibilities related to interface development tasks are identified centrally in section 3.1 Project Roles & Responsibilities.

The City will be responsible for developing any programs required to extract the data from the current system or other third-party systems in the required format and any programs required to update the City third party system with data from the Oracle CX applications. The City shall be responsible for any required coordination, customizations to and ongoing maintenance of Non-CX Incumbent legacy systems and third parties.

AST will utilize all available Oracle CX applications tools to assist the City including:

- Oracle Service Cloud Data Import Wizard. This will enable the City to load data in bulk from CSV files into Oracle Service Cloud.
- Oracle Service Cloud Web Services APIs. This will allow for scripting custom data imports that cannot be performed using the data import wizard.

AST will work with the City to further review integration requirements and then determine the best method of interfacing data to and from the City third party applications to the Oracle CX solution.

2.5 Data Conversion

AST shall be responsible for designing and developing the methods and programs for the data conversion scope as identified in Appendix 2 -Scoped Data Conversions of this Statement of Work.

AST and the City will perform a data mapping exercise as part of the product effort. The exercise will establish the data model in which the City will use for data export processes. The City shall be responsible for data extraction from the legacy system(s) and any data cleansing to fit the data format to be provided by AST. AST shall lead the effort for loading the data into the Oracle CX system.

AST will run data conversion up-to two times in the development environment, either during system integration testing (partial load), to validate the data conversion process prior to the production run.

AST will work with the City to load the data into a development environment for validation prior to loading in production. Development data loads will be performed up-to two times, should issues arise based on the City's data. Issues that are caused by AST implementation will not count toward the two data load quota. The City will verify converted data, with AST's assistance, during testing and will provide guidance and assistance with conversion error recognition and resolution.

2.6 Reporting

AST shall provide reporting services and tools to accomplish two (2) broad objectives upon the Go-Live of each project phase:

- Deploy all the necessary standard reports, queries, and forms in conjunction with the appropriate preparation of end-users to know how to access, execute, and apply the data to their respective functions; and
- Define and train select City personnel on the software tools and methodologies to address future reporting needs of the City.

AST will provide the following services, to develop the Reports, Queries, and Forms Strategy and Plan:

- Identify reports, queries, and forms required for normal business operations in the respective functional areas; and
- Create a disposition for identified reports when the Oracle SaaS software solution is deployed using the following options:
    - Using standard SaaS System Solution software reports, on-line inquiry pages, or other on-line data access methods;
    - Developing scoped and City approved custom queries using tools resident to the SaaS System Solution software.

2.6.1 Standard Reports

Oracle CX applications comes with standard reports and ad-hoc reporting capabilities. As part of the scoped work, AST shall deploy all available standard (out-of-the-box) Oracle CX applications reports.

2.6.2 Custom Reports

It is the intent of the City to use standard reports in the Oracle CX solution and therefore no custom reports are initially scoped. However, a single pooled bucket of 800 hours is available for implementation work that is not allocated to a specific deliverable in this SOW. Custom report configuration may be requested for delivery and deducted from the bucket as the City identifies unknown requirements during implementation.

2.7 Customizations/Modifications

Oracle Cloud CX applications come standard with built-in industry best practices. Since the solution is hosted externally by Oracle, customizations are not permitted and therefore not scoped. AST's objective is to help City streamline the business processes and implement the standard process flows built into the Oracle Cloud Applications. This may require changes in certain business processes and operating procedures.

AST bases the implementation scope on our response to the requirements listed in the Functional Requirements at a very high level. During the Define and Model Stages, as these requirements are translated to business process flows, City intent with the requirement may be determined to be different than that which was assumed may require further clarifications. AST's ability to develop solutions for the business requirements would be governed by available functionality and the operational capabilities within the Oracle Cloud services being implemented. Cases in which the proposed out of the box/standard functionality deviates from the way in which City chooses to address specific functionality/business processes (while still reaching the same outcome) may result in additional

consulting effort. Any such instances will be discussed and the details mutually agreed upon by City and AST.

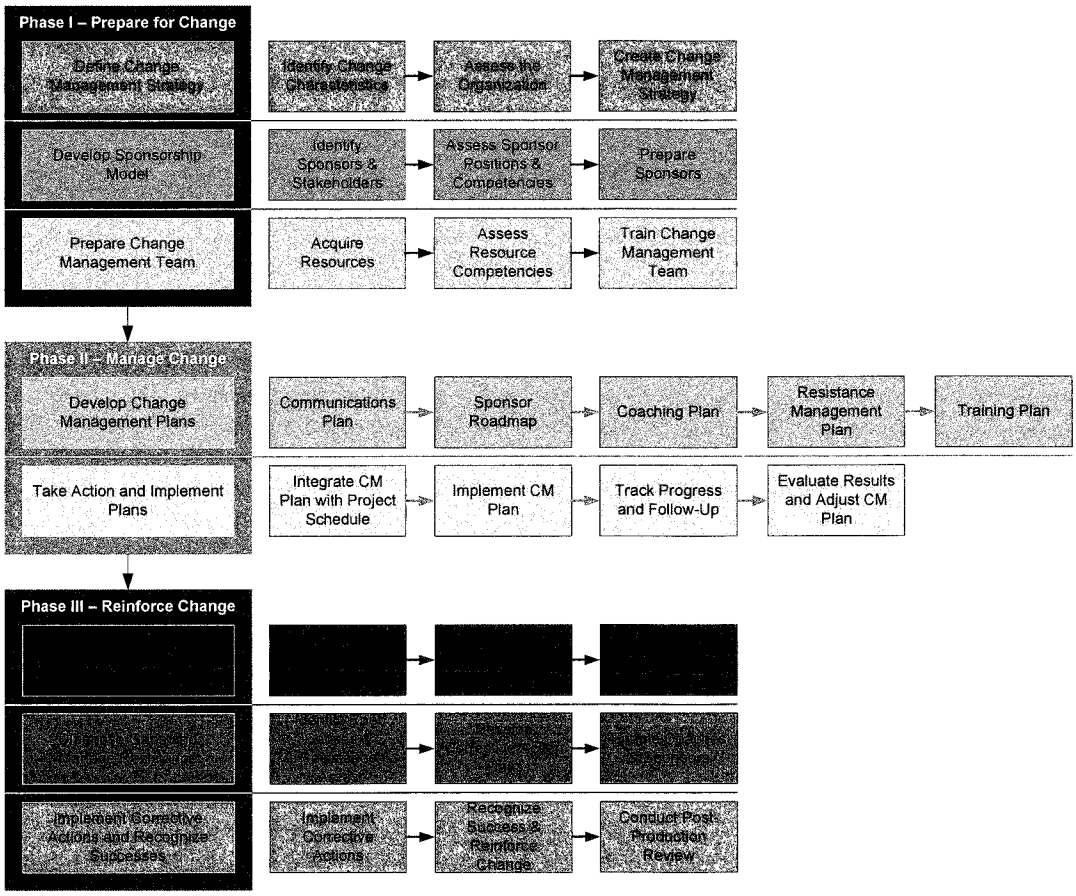
In some cases, it may not be technically possible to meet the requirements due to the lack of availability of data, limitation of the Oracle software or for other system architecture reasons. This infeasibility may not become apparent until the Model stage. In such cases, AST will provide help and guidance to City concerning alternative methods to meet its business requirements which may include implementing process changes or manual steps.

2.8 Organizational Change Management

The primary purpose of the proposed Change Management strategy is to facilitate a smooth transition to the City' newly implemented Oracle CX system by informing users and stakeholders of the changes that will occur as a result of the new system, and by communicating the project status on a regular basis.

Given the indeterminate nature of change, there is no single best approach. However, a structured approach that has been proven in similar implementations does allow for a methodical evaluation of the potential consequences of the change and eventually achieve successful organizational change. The strategy and adaptation of methods and deliverables recommended by AST is best illustrated in the change management model shown in Table 2.8-2. This will help guide the personnel impacted by the system and process changes in a well-planned and effective manner.

Table 2.8-1 Change Management Methodology



AST's Change Management Lead will work with the City to identify potential organizational impacts of proposed new business processes and establish effective ways to address them. Careful management of business process, organization, and job role changes is essential because these can preset a risk to the project's success. However, making such changes wisely increases the City' opportunity to maximize the benefits of this Oracle implementation.

The change management services associated with this project will lay a foundation for future organization wide change initiatives. The services we propose include:

- Executive Engagement Interviews that feed into the Sponsorship Model
- Key Message Development of initial communications that are included within the Communication Plan
- Organizational Change Readiness Assessments throughout engagement
- Creation of Change Management Strategy, including Communication and Training Strategies
- Ongoing support of the City Change Management team in deployment of change management, communication, and training initiatives

Organizational change management is most effective when the client personnel are viewed to be spearheading the change. AST will lead certain efforts with the expectation that once overall strategies are established, the City will take ownership for delivering Change Management activities. At that point, AST will provide oversight, coaching, and tools.

To support business process changes and their potential impacts, AST will assist the City in the following:

- Assemble a group of "Change Agents" representing all departments of the organization. Have this group participate in the Sprints or testing events.
- Identify organizations, work groups and job roles that will be most impacted by technology and business process changes.
- Determine how each group will be impacted, and the degree of change expected in their job duties, accountabilities, skills, performance expectations, etc. These findings will be documented in a Change Impact Analysis.
- Assess employees' capabilities and preparedness for the new performance requirements and recommend the information, training, tools, or other supports that will be required to enable desired performance.
- Identify any additional changes in organizational structures, work environment, policies, management processes, etc. that will be needed to enable or support "to-be" business processes and make certain that new performance targets can be both attained and sustained.
- Document and communicate organization and job role changes via New/Changed Organization Profiles and New/Changed Job Role Profiles.
- Create Transition Plans to manage the human and organizational impacts of the project. A transition plan identifies organizations and job roles that will be changed, created, or eliminated, and identifies the actions needed to make a smooth transition to production. The transition plan will be incorporated into the Training Plans and feedback analysis reports.
- Create a production support infrastructure that provides support to end-users as they conduct their day-to-day tasks using the new system. This support includes a Help Desk, access to external support through Oracle Support, and easy access to procedure documentation and other references. Working with the City' Core Project Team, AST will provide guidance in establishing a support structure for the City.
- Reach agreement on measurable or observable ways to track the effectiveness of organization and job role changes, so that adjustments can be made as needed to accomplish optimal effectiveness.

2.8.1 Communicating Change

Effective communication is the key to a successful project and an essential part of our approach to Organizational Change Management. Our Change Management Lead will work with the City's Change Management Lead to develop a comprehensive Communication Plan. The Communication Plan will include all the communication channels that will be deployed to ensure effective communication with the stakeholders (department personnel, end-users, etc.)

The purpose of the Communications Plan is to define and document:

- The communication methodologies – events, literature and media – and structures used to disseminate information throughout the Change Management effort.
- The roles and communication structure that will be used to exchange relevant Change Management information.
- The regular meetings, reporting, and other communications that take place during the project, and identify the type of information, the medium for communicating, and the audience to whom information is directed.

A combination of direct and indirect communication mechanisms can be employed during the Change Management effort. Indirect methods generate awareness and interest, while direct methods will be used to generate desire and action. No one method is suitable for all users from the City or for all

purposes, and each has its advantages and disadvantages, so a combination should be used to reach all end users and managers.

Some types of communications will be more effective than others during the different phases of the project. Indirect or one-way communication in the form of e-mails, notices, and intranet are effective in generating awareness. Direct or two-way communication in the form of interactive workshop sessions, road shows/presentations, or interviews are generally more effective in generating interest or motivation and getting end users to participate. Table 2.8-2 Communication Objectives and Methods of Communication outlines the communication objectives, the type, and the possible mechanisms proposed for the City.

Table 2.8-2 Communication Objectives and Methods of Communication

Objective	Communication Objective	Communication Type	Possible Mechanisms
Make the Case for Change	Create the need or the want to try	Direct	Seminars, site visits, demonstrations, high-level training sessions
	Create interest or information seeking behavior	Indirect	Newsletters, brochures
	Gain attention	Indirect	E-mails, notices, announcements
Commitment & Transition	Motivate usage	Direct	Seminars, training, change advocates
	Reinforce usage	Indirect and Direct	Web sites, Help desk, E-mail contacts
Reinforce Change	Gather Change Management implementation feedback	Direct	One-on-one or group meetings with users; meetings with Project Leadership
		Indirect	Surveys, website, E-mail

The ultimate goal of the Communications Plan is to ensure:

- Users have received relevant and timely information.
- Users understand the objectives of the Project.
- Users are aware of the likely impact of the Project.
- Users know where and how to obtain information about the Project.
- The Project is receiving relevant feedback.
- The Project retains a high credibility factor.
- The City's personnel across the organization are participating in and taking responsibility for communicating upwards, downwards, and laterally.
- The City's personnel have an outlet to provide input to the Project.
- The City's personnel are aware of and understand how the Oracle CX system implementation project will affect them in terms of anticipated changes and events.

2.8.2 Change Management Planning

Typical Change Management plan components are shown in the following table. The plan will be created to meet the specific needs and constraints of the City.

Table 2.8-3 Sample Change Management Plan

[illegible]	[illegible]	[illegible]
Project Kick-off Meeting	Project team members will be briefed on the implementation process and methodology to be adopted. Project phases and the participation of the user community in each of the phases will be discussed. Finally, the communication and feedback mechanisms available to the users will be reviewed.	Core Project Team, AST Team
Prepare to Lead Change	Conduct workshops for the Change Management team and Change Agents to prepare them for their roles in the transformation to the new Oracle CX system.	Change Management Leads; Change Management Team members; Change Agents
Communications	Depending on the needs of the City, communication action items can be integrated with the Change Management plan. If needed, communications can be broken out into a separate plan.	Change Management Leads
Change Agent Meetings	The Change Agent network is a key conduit of information between the end user community and the project team. The new features and enhancements available in the Oracle software will be shared. Questions and concerns will be captured as a part of these meetings.	Change Management Team; Change Agents
Change Characteristics and Organization Attributes Assessments	Interview executives and other key leadership resources to gather information about the "Why Change?" message, past history with significant transitions and the perceptions about impact.	Change Management Leads; Executives
Sponsor Roadmap	Identify the actions executive and other key leaders need to take in order to be visible and active sponsors of the change to the new Oracle CX system.	Change Management Leads; Change Management Team
End User Surveys	Conduct surveys throughout the project to quantify the levels of awareness, understanding and acceptance of the changes presented by the project.	Change Management Leads; Change Agents
Resistance Management	Detail the steps the Change Management team will take to identify potential resistance, verify the resistance and implement any needed countermeasures.	Change Management Leads; Change Agents
End User Training	A Train-the-Trainer approach will be used for end user training. As a key component of the change management process, there is a major emphasis on end user training as part of the implementation project. Training sessions will be used to introduce the users to the system. Training material will include job-aids and end user training guides. The training process will include feedback on the effectiveness of training.	Core Project Team, AST Team, Business SMEs, all end users

2.9 Training

AST shall provide training to the City using the "Train-the-Trainer" model. Training will be broken into different sessions based on user roles defined between AST and the City. AST shall be responsible for creating system training materials based on the City's new business processes and Oracle CX configuration. AST will also be responsible for training the City's designated trainers so that they can

conduct end user training. The City also may enhance the training material by adding non-system related policies, user procedures and other comments. The City can also optionally procure Oracle University class credits and other training classes from AST.

Classroom based training shall be conducted on-site at the City and led by City trainers, using City provided equipment. The training location should include training aids such as a projector, whiteboard, and workstations.

2.10 Post Production Support

AST shall provide thirty (30) consecutive calendar days of post-production support during business hours after "Go-Live." "Go-Live" means the first day of the last instance of a "Deploy" phase defined within the project methodology and project timeline.

AST project team providing this support shall consist of resources who participated in the implementation of the major modules deployed during that phase.

Additionally, the City shall have ability to procure AST's managed support services through a change order process.

2.11 Application Release Management Services

For the duration of the implementation project, AST shall provide application release review services to aid the City when Oracle releases its quarterly patches. Such services will include analysis of each patch release content published by Oracle in collaboration with the City, to identify the potential impact of the changes introduced by the patch and the new functionality defined as available within the patch. Additionally, AST shall provide basic recommendations on the approach the City may take in the application testing related to the patch as well as any Oracle recommended configuration changes necessary for continued functioning of the applications.

2.12 Project Change Control Process

The procedure for the Project Change Order Process is outlined in Appendix 4 Project Change Control Process of this document.

3. Project Roles & Responsibilities

For the successful execution of the project, the cooperation, support and interaction with the City's personnel will be valuable to the AST consultants working on the project. AST consultants will work closely with the City staff to form a cohesive team. A clear listing of the roles and responsibilities of the team members will prepare them to meet the challenges of the project and accomplish the project objectives in the planned timeframe.

3.1 City's Staff Roles and Time Commitments

Listed below are the expected City's roles, the approximate time commitments over the course of the project, and required skill sets for each group. At the discretion of City and in consultation with AST, to support potential resource gaps, some of these roles may be filled by third party consultants.

Table 3.1-1 Roles & Time Commitment

Role	No. of Staff	Skills	Schedule / Time Commitment in Hours			
			Phase	Phase	Phase	Phase
Steering Team	??	Provide guidance and direction to the project team. Decision making ability and leadership.	5%	5%	5%	5%
Project Sponsor	1	Provide guidance and direction to the project team. Decision making ability and leadership.	20%	20%	20%	20%
Project Manager	1	Ability to manage large projects; understanding of the City 's business processes and approval hierarchy; good communication skills	100%	100%	100%	100%
Change Management Lead	1	Planning and communication skills. Knowledge of interdepartmental and interpersonal dynamics within the City.	80%	100%	100%	100%
Training Lead	1	Training Coordinator. Knowledge of Departments and their participation requirements	10%	25%	50% (100% during 2.5 months prior to production per phase)	100%
City Trainers	2-3	Train City Staff on Modules	0%	0%	25%	100%

		being Implemented in each phase			(100% during 3.5 months prior to production per phase)	(100% during 3.5 months prior to production per phase)
Support Admin	1	Admin Support. Schedule People, Rooms and equipment, assist with project documentation and management	25%	25%	25%	25%
Team Leads/ Functional Lead (1 Per Functional Area)	1 per functional area	Complete understanding of the City's policies and procedures; Authority to make process design decisions	65%	65%	65%	65%
Business Analysts (1 Per Major Business Area/ Dept.)	1 per business area/dept	Full understanding of Business Area/Dept. procedures; Ability to communicate process design/decisions to the departments	20%	25%	25%	25%
Technical Team Lead	1	Provides key support to City staff during the implementation; performing tasks and activities in support of data conversions, system integration, workflows, and reports. Manages City technical resources, schedule and work related to design and development.	100%	100%	100%	100%
Technical IT Analysts	2	Programming experience; data extraction for conversion, interface development, script development; ability to create technical design documents.	50%	80%	80%	80%
Network/ System Admin	1	Knowledge of the City's networking infrastructure and capacity; capability to work with role assignment and application security	10%	10%	10%	20%
Quality Assurance	1	Provide leadership and delivery for Quality Assurance activities such as testing validation, UAT scenarios, and standard quality tasks.	50%	50%	100%	100%

Solution Architect	1	The City's representative for analyzing and approving solution architecture plans and delivery.	75%	75%	75%	10%

Additionally, City may assign backup Subject Matter Experts and department representatives as required and decided by the City Project Sponsor in consultation with AST.

3.2 AST and City Roles & Responsibilities

The table below identifies the lead responsibility for all the important tasks on the project. The Change Management and Training Roles & Responsibilities are included in section 2.5 and 2.6.

3.2.1 Roles and Responsibilities

Table 3.2-1 Project Team Roles Definition

Project Team Roles		AST Team Role Description	City Team Role Description
Project Management	**Steering Team**		Provides project oversight, address issues presented by the Project Managers, clear roadblocks that jeopardize project success. Review and decide on major changes to the project. Set and maintain alignment of project goals and expectations. Provide insight and counsel in addressing policy and cross-functional issues. Provide assistance in managing the expectations of the organization in terms of the challenges, issues and benefits of the project and resulting solution and business processes.
	Project Executive(s) / Steering Team	This individual has ultimate authority over the Project and is responsible for ensuring appropriate funding and resource commitment. The Project Executive works with the Steering Team, Project Sponsors, and Project Managers to ensure that the project meets the company's Goals and Objectives.	These individuals have ultimate authority over the Project and are responsible for ensuring appropriate funding and resource commitment. The Project Executives / Steering Team works with the Project Sponsors and Project Managers to ensure that the project meets the City's Goals and Objectives.
	Project Manager	Manages the project schedule and task completion. Ensures project deliverables are reviewed and approved in a timely manner. Allocates, manages and directs AST project resources. Works with the team members to coordinate, communicate and escalate issues to the Steering Team. Manages, tracks and communicates project risk, issues and decisions. Monitors, manages scope and the change order process.	Assists in planning and managing the project tasks and co-leads project efforts to schedule. Acts as the primary contact between City of Jacksonville and AST. Ensures project deliverables are reviewed and approved by the City of Jacksonville on schedule. Allocates, manages and directs City of Jacksonville project resources. Works with the team members to coordinate, communicate and escalate issues to the Steering Team. Manages, tracks and communicates project

Project Team Roles		AST Team Role Description	City Team Role Description
			risk, issues and decisions. Assists in monitoring, managing and controlling scope.
	Administrative Support	Works with the PMO to coordinate day-to-day project tasks and apply updates to the project calendar. Advises project team members on obtaining access to resources in support of the project (e.g., conference room scheduling, projectors, office supplies). Maintains project documentation library and artifacts. Administers all invoicing, billing, reconciliations, and discrepancies. Assists with preparing issue, risk, change requests and other materials for project meetings.	Works with the PMO to coordinate day-to-day project tasks and apply updates to the project calendar. Advises project team members on obtaining access to resources in support of the project (e.g., conference room scheduling, projectors, office supplies). Maintains project documentation library and artifacts. Assists with preparing issue, risk, change requests and other materials for project meetings.
Functional Team	**Solution Architects**	Plans, conducts, and analyzes unique problems in a broad system; prepares overall project recommendations; determines a design strategy and ensures consistency across all configuration streams; designs and monitors testing and implementation plans; studies broad areas of projected work processes which cut across systems; conducts continuing review of computer technological developments applicable to system design; and prepares long range forecasts.	Assists with Solution Design and Validation. Reviews Architecture, Compatibility with Existing City systems
	Functional Lead	Performs work related to assigned Oracle module and functional areas. Leads all major milestone activities and task for the assignment Oracle module/functional area. Participates in design sessions related to the development of application interfaces, data conversion, and reports. Leads conference room pilot activities, functional issue and risk resolution. Reviews, analyzes and addresses test results. Supports the creation and execution of test scripts and test events. Supports and assists the City in business process analysis, impact assessments and procedural documentation. Supports training activities and material preparation. Participates in activities related to production cutover including the review of a production cutover script. Performs functional knowledge transfer to City resources.	
	Project Sponsors		Maintains the project vision, acts as the project champions for business area domain. The Project Sponsors work with the

Project Team Roles		AST Team Role Description	City Team Role Description
			Steering Team and Project Managers to ensure that the project meets the City's Goals and Objectives. Defines expectations and success indicators for business area. Reviews, analyzes and recommends direction to address business area process alignment and/or changes.
	Team Lead / Functional Lead		Responsible for describing desired business functionality, processes and procedures specific to their subject area. Assist with application configuration and Conference Room Pilots. Takes a leadership role in the analysis, cleanup, and validation of legacy data. Assists with the analysis, design and development of end-user reports. Works interactively with the AST Functional Lead in the resolution of Functional issues.
	Business Subject Matter Experts (Representation from Departments for each Business Area- To be Determined by the The City of Jacksonville)		The Business SMEs role is to support the Team Leads / Functional Leads on an as needed basis, however in cases of specialized applications and to represent their departments, they may have to assume a leadership role typically performed by SMEs / Functional Leads. Their activities include participating in the requirements, design and configuration sessions, assisting in identifying and supporting the implementation of processes within the business, and resolving data issues related to conversion and integration. Participates in user acceptance testing, training and knowledge transfer activities.
	Technical Team Lead	The Technical Team lead provides key support during the implementation; performing tasks and activities related to data conversions, system integration, workflows and reports. Manages technical resources, schedule, and work related to design and development. Develops and enforces technical design standards. Supports testing cycles, reviews and approves results. Leads knowledge transfer for technical team as well as technical production cutover activities. Manages, reviews and communicates status related to technical project components	The Technical Team lead provides key support to City staff during the implementation; performing tasks and activities in support of data conversions, system integration, workflows, and reports. Manages City technical resources, schedule and work related to design and development. Supports testing cycles, reviews and approves results. Ensures staff ability to sustain solution post go-live by leading City team via participation in technical knowledge transfer as well as cutover activities. Manages, reviews, and communicates status related to City's technical project components.
Technical Team	**Technical Analyst**	Creates technical design documents and performs	Assists with integration design and development. Provides

Project Team Roles		AST Team Role Description	City Team Role Description
Training, Communications, and Change Mgt Team		development for various system components including data conversion, interfaces, workflows, reports and personalization. Supports application testing cycles and post-production activities. Reviews, analyzes, and resolves technical issues. Participates in knowledge transfer sessions.	legacy data extraction and load programs as required to support testing and the implementation process. Supports application testing cycles and post-production activities. Reviews, analyzes, and resolves technical issues. Participates in knowledge transfer sessions.
	Testing Lead	Plans, conducts and drives the testing strategy, development of testing materials, and testing. Provides oversight to those project participants that are creating and/or contributing to the testing event, material, and required test data. Participates in appropriate project activities required to gain knowledge of the CX based solution and aligning business processes. Manages the planning, execution and documentation of testing events.	Participates in the planning and execution of the testing strategy, development of testing materials, and testing. Provides oversight to those City project participants that are creating and/or contributing to the testing event, material, and required test data. Participates in appropriate project activities required to gain knowledge of the CX based solution and aligning business processes. Manages the City's planning, execution, and documentation of testing events.
	System Administrator	Supports and performs development and test environment administration. Create new users, roles, and responsibilities as needed for the various access functions. Creates procedures for managing and monitoring background jobs, workflows, and system alerts. Assists developers in registration and migration of programs and data. Manages various system environments during the project and helps resolves system problems.	Supports and performs development and test environment administration. Creates new users, roles, and responsibilities as needed for the various access functions. Creates procedures for managing and monitoring background jobs, workflows, and system alerts. Assists developers in registration and migration of programs and data. Manages various system environments during the project and helps resolves system problems. This role will be both from a technical and business perspective for the City.
	Change Management Lead	Evaluates and assists with the City's organizational readiness during the systems implementation process. Identifies the business/personnel impact and proactively addresses the related change management issues. Develops Change Management Deliverables. Assists in reviewing impacts of solution and process changes on the City's organization and roles within the organization. Assists with organizational change readiness including training, training material, and "go/no go" assessments.	Evaluates and assists with the City's organizational readiness during the systems implementation process. Identifies the business/personnel impact and proactively addresses the related change management issues. Reviews and operationalizes Change Management Deliverables. Assists in reviewing impacts of solution and process changes on the City's organization and roles within the organization. Assists with organizational change readiness including training, training material, and "go/no go" assessments. Works with departmental liaisons to track and monitor readiness for departmental staff as well as respond to employee concerns, points of risk or resistance, and corresponding mitigating actions. Monitors and escalates issues that may require one-

Project Team Roles		AST Team Role Description	City Team Role Description
			on-one meetings with employees.
Training, Communications, and Change Mgt Team	**Training Lead**	Plans, conducts and drives the training strategy analysis, development of training materials, and delivery of training. Provides oversight to those project participants that are contributing to the training material, instruction, and other training related content. Participates in appropriate project activities required to gain knowledge of the CX based solution and aligning business processes	Assists in planning, conducting, and driving the training strategy analysis, development of training materials, and delivery of training. Provides oversight to those City project participants that are contributing to the training material, instruction, and other training related content. Coordinates the enhancement of training materials with business practices, policies, and procedures by functional business owners. Participates in appropriate project activities required to gain knowledge of the CX based solution and aligning business processes. Leads or directs activities pertaining to the scheduling of training events; including calendaring, invitation responses, and training room equipment and logistics.
	Training Coordinator		Participates, supports, and conducts training delivery during Training phase. Documents key training results from classroom-based training. Supports computer-based training changes, lessons learned, and enhancements to materials.

The designated City users shall be made available during the project for the interview, system demonstrations, system testing, decision-making, and other tasks related to this project.

3.2.2 Project Organization

AST shall work with the City to assemble a cohesive team of consultants, users and client IT personnel. The Oracle CX project will be lead jointly by the AST's and the City's Project Management team to create a total synergistic approach to project management and promote the most effective communication throughout the project. The project governance structure will be developed at the start of the project.

3.3 Project Location(s)

AST shall provide the services onsite at the City's premises in Jacksonville as well as remote locations. Access to the worksite should be unlimited (i.e. 24 x 7 x 365).

The City will provide adequate workspace and infrastructure (including but not limited to network and Internet access) for the AST project team members. The City shall provide network and system connectivity for AST consultants using their laptop computers and remote access (VPN or equivalent) to the Oracle and City systems.

The City will be responsible for making facilities available and required infrastructure ready for tasks like training, conference room pilots, system testing, and other events.

4. Project Deliverable Acceptance and Assumptions

The City will accept project deliverables identified in section 2 Scope of Services of this Statement of Work by the deliverable acceptance process outlined below. Both AST and the City agree that time is of the essence in reviewing and accepting deliverables and that both parties will endeavor to make the deliverable review and acceptance process as timely as possible. To that end, both parties, for project planning purposes only, agree to the following during the project:

- As the project tasks that lead to project deliverables are initiated, AST and City project managers will mutually review, and revise as necessary, the delivery review period goal for each deliverable.
- AST will provide the City with examples of deliverables and/or the deliverable format / template at the earliest possible point within the project to give the City as much knowledge of the deliverable as possible.
- AST will informally review deliverable content and deliverable progress with City Project managers and City project staff prior to formally presenting the City with a completed deliverable. The City will endeavor to provide feedback to AST during these informal reviews on areas where the deliverable is not complete or not acceptable to the City.
- AST and the City will agree, per the deliverable acceptance process outlined below, on the deliverable review period upon the formal submission of the deliverable to the City by AST.

4.1 Deliverable Acceptance Process

The following process will be followed for acceptance of deliverables during the project:

4.1.1 System Deliverables Acceptance:

Upon completion of a system event (e.g., Development Environment Created, Sprint Complete), AST Project Manager shall submit a deliverable approval request to the City's Project Lead. Upon AST's submission, the City's Project manager shall verify the completion of the system event and provide an acceptance within five (5) business days.

4.1.2 Non-System Deliverables Acceptance:

All completed non-system deliverables will be reviewed by AST's project manager and uploaded to the designated project repository/network folder. AST Project Manager shall notify the City's Project Manager and submit a Deliverable Acceptance Certificate.

Upon AST's submission of a completed Deliverable, City shall review the Deliverable and approve it or notify AST of the discrepancies and errors found in the Deliverable, within five (5) consecutive business days, other than for large deliverables which shall have ten (10) consecutive business days, unless otherwise mutually agreed to in writing by the Project Managers of both the parties. The determination whether the deliverable is large, shall be done jointly by the City and AST Project managers.

If the City requires revisions to the submitted deliverables, all the required changes shall be collected and consolidated by City Project Manager into one document and provided to AST Project Manager within the stipulated time period. AST shall then revise the Deliverable or satisfactorily explain the

reasons for Accepting the Deliverable "as is". Upon receipt of the revised Deliverable or receiving a satisfactory explanation for the deficiencies identified, the City's Project Manager will verify that the changes were incorporated and accept the deliverable within five (5) consecutive business days. There shall be no new revisions requested for the deliverable other than those identified previously in the first round.

In the event that neither approval nor feedback from City is received within stipulated time period, the deliverable shall be deemed as accepted.

The City shall not use any Deliverable in a production environment or in the ordinary course of the conduct of their business prior to Acceptance of the Deliverable and such use shall, without the written consent of AST, be deemed Acceptance of such Deliverable.

4.1.3 Post Production Support:

Once the Acceptance of all pre-Go-Live Deliverables associated with the project has occurred, the City shall begin using the Software Components for Productive Use ("Go-Live Date").

AST shall provide Post production support for four consecutive weeks from the go live of the system.

4.1.4 Warranty Services:

AST warrants that the Services shall be performed and delivered in a professional, first-class manner in accordance with the Contract and the standards prevailing in the industry. AST shall also undertake the following actions without additional consideration (fees) for the period of one calendar month beginning on the date of City's Acceptance of the CRM Solution: (i) promptly making necessary revisions or corrections to resolve any errors and omissions on the part of AST when requested in writing by the City to the AST in connection with the warranties provided; and (ii) conferring with the City for the purpose of interpreting any of the Services or information furnished on City's request that AST shall take such actions in connection with the warranties provided under this Section 3.4 of the Master Agreement.

The Warranty services relates to the Services provided by the AST and does not include Oracle product issues and does or overlap with the product support services agreements between City and Oracle. The System Performance Warranty and System Integration Warranty would be null and void if

A. City modifies the AST delivered applications
B. City modifies the hardware environment
C. City installs any additional third-party software within AST delivered applications environment
D. City changes its business processes, organization or approval hierarchy, rules and regulations causing the delivered software solution to be deficient or non-functional.

Issue Classification:

The priority assigned to a System Issue/Incident is primarily determined by the following factors:

- The impact on the business in size and scope; e.g., financial impact (loss)
- The urgency to the business in time dependent operations

The following are the definitions that will guide how system issues will be prioritized by AST and City.

Table 4.1.4.1 Issue Priority Definitions

Severity	Description of Service Request Severity (Priority) Code	Response
Priority 1	Defined as an incident that renders a production system inoperable. Users are unable to connect to or use the system to support City business functions	• Assign resources to work on the problem • Log Service Request (SR) with Oracle, if necessary • Communicate status every hour until fixed
Priority 2	Defined as an intermittent outages and/or failure of the Production System, interfering with normal operation. May also be defined as a system/application that is operating but with severe restriction or affects a time sensitive function.	• Assign resources to work on the problem • Time sensitive issues will be addressed until resolved or a work-around acceptable to the City is found, in which case the priority will be lowered. • Log Service Request (SR) with Oracle, if necessary • Communicate status every hour until fixed.
Priority 3	Defined as a production system/application problem affecting majority of the users. Significant manual intervention is required to support normal operations	• Assign resources to work on the problem. • Communicate status every day until fixed

The priority of a defect does not necessarily determine how soon an issue will be resolved; it merely indicates the urgency and order in which the issues will be undertaken for resolution. The resolution time will depend on several factors including the complexity of the problem, dependency on users input, ease of replication in test environment, etc. Resolution of issues may require the software/hosting vendor to provide patches or replacement parts, and therefore may not be within the control of AST.

4.1.5 Final Acceptance

After acceptance of the final deliverable of the Oracle CX System has occurred, the system is considered "Finally Accepted."

4.2 Project Assumptions

4.2.1 Scope and Terms Assumptions

1. The scope is established as per deliverables defined in this document. The resource and cost estimates have been based on this scope and the accompanying delivery schedule. Any changes to project scope, time line, approach or resources will be subject to a formal change control process and may result in an increase/decrease to project costs.
2. Any changes to the overall solution which are not already identified in this statement of work would have an impact (increase/decrease) on the implementation timeline and cost.
3. The City will designate a project sponsor (or sponsors) who shall represent the City during the performance of services, ensure performance obligations, establish and maintain an active line of communication with the AST project manager during the performance of the services, and make timely decisions on behalf of the City on all relevant issues.
4. The City shall authorize AST personnel access to the appropriate City facilities required for the Oracle CX system implementation.
5. The City will be responsible for making facilities available and required infrastructure ready for tasks like Training, Sprints, Testing sessions, etc.
6. The City will be able to provide detailed information related to third party vendors.
7. The City will be responsible for managing the relationship with all third-party vendors to ensure timely and accurate work related to integrations, data exchanges, etc.
8. If the Oracle CX Applications does not deliver functionality to meet a specific requirement, AST will work to develop acceptable workarounds which may include alternative use of the Oracle CX Applications or external activities.
9. The resource planning for implementation services are based on the scope of the SOW. Removal of individual items from scope will not necessarily reduce the resources.
10. Any security, authentication, or firewall ports that need to be opened, etc., for integration with products not provided as part of the Oracle CX solution (i.e. UCCX, etc.) will need to be provided by the City as required.
11. The City will be responsible for maintaining any required development, test and production servers that include – hardware, operating system, integration software, database and any other software used in City-managed applications (i.e. UCCX, etc.) that will be integrated into the Oracle CX solution.
12. The City will be responsible for any required changes to applications that are not being supplied by AST or Oracle as part of the Oracle CX project effort. AST will work with the City to assist the City's application owners if changes or enhancements are required for those applications as part of the Oracle CX project. Should such changes be required, the City will supply the appropriate resources to manage and update those systems.
13. UCCX will be responsible for providing telephony voice services, IVR, caller routing/flows, call recording, and all other voice/telephony services. AST's CTI add-on for Oracle Service Cloud will provide CTI toolbar in Service Cloud to leverage and interact with the services provided by UCCX. Capabilities will be dependent on UCCX version used by the city and the API(s) provided by that application.
14. Implementation timelines are based on the ability of both the City and AST to have Oracle environments provisioned for delivery based on this timeline. AST shall not be responsible for

Environments not being available due to Subscription service (SAAS) being terminated for non-payment to AST.

15. Agents will leverage the OSvC agent console for this implementation. Browser UI implementation is not included in scope.
16. City employees will leverage OSvC-based or the City's ADFS (SAML 2.0) authentication to login to the agent console.
17. The City's ADFS team will be responsible for all ADFS configuration to enable ADFS-based SSO for Service Cloud (though, AST's consultants will guide them through the configuration).
18. Any required agent-based customizations/configuration (agent console) will be performed in the OSvC agent console; not the browser UI.
19. The City's ArcGIS system will be exposed to Oracle Service Cloud, typically via web services (REST or SOAP) and/or HTTP requests, that will allow for the required integration(s) for mapping display, coordinate retrieval, or any other mapping function that would be dependent on that service.
20. ArcGIS exposes either GET or POST parameters that allow setting the center of the map and pin placement based on data send through a standard HTTP(s) request.
21. ArcGIS will be used for all mapping display and UI functions. Oracle Service Cloud will be the source of data for issue management, types, priority, department, etc., but the drawing of that information will be based on the capabilities of the City's ArcGIS application and its ability to consume the data provided by Service Cloud for display on a map.
22. Costs from ArcGIS API or integration calls are not included in the Oracle product list or within this statement of work.
23. The City will be responsible for any configuration or updates in ArcGIS that are required to integrate the two systems for visual search, incident placement, and any other mapping requirement as part of this project.
24. The City's "master address list" database used for validation of addresses is exposed as a service that can be integrated with using web services (REST or SOAP) and is exposed through the City's firewall such that AST does not need to make any changes to that service to access its functionality.
25. Any data that needs to be migrated from legacy systems to this new Oracle CX system will be exported and sanitized for accuracy by the City.
26. Any data that needs to be migrated from legacy systems to this new Oracle CX system will be provided in a single CSV file per table. Each table must be formatted such that a single row is one line in the CSV file. A unique delimiter must be provided in the CSV file so that column changes are distinguishable from row/cell content.
27. In order to provide a service channel through SMS, a SMS service provider must be available to the City in order to be delivered as part of this project.
28. SMS estimates provided in this document have been provided based on a web services-based SMS service provider (such as Twilio). The capabilities of the SMS solution will be dependent on the API and capabilities of the SMS vendor that the City uses. Therefore, SMS functions and deliverables will be dependent on the technical capabilities of this provider. AST will inform the City if the chosen provider limits SMS implementation capabilities.
29. Costs from the SMS service provider are not included in the Oracle product list or within this statement of work. The City will be responsible for a contract with the selected SMS vendor.
30. "Official Payments" is currently the City's payment processor of choice and will be used for payment collection via the Service Cloud Customer Portal. The service arrangement between the City and

"Official Payments" to provide payment services is not part of the Oracle product list or within this statement of work.

31. Payment receipts will be presented to the citizen as HTML pages. They will be formatted for printing through CSS defined during the requirements gathering phase of the project.
32. City GIS REST MapService used for waste pickup data is exposed to the public Internet so that the mobile application can connect to it regardless of location, is either an authentication-free service, or provides a mechanism for validating individual users (OAuth, etc.) so that service user account(s) are not used in the mobile application and exposes the necessary API to gather data that would be required to present to a mobile user as part of the mobile application requirements.
33. Geo-coordinates (lat/long) will be stored in Service Cloud as string values.
34. Save and resume features for customer-facing intake forms requires that the contact be logged in to the system so that the form can be associated to the proper user.
35. Data export formats from Oracle Service Cloud will be Excel, CSV, PDF, and XML; the formats the Oracle Service Cloud natively supports for export in the analytics tools.
36. Mobile requirements will be implemented through browser-based Customer Portal implementation regardless of the City's decision to implement a native mobile app for distribution through app stores. Mobile application development will be limited to iOS and Android platforms supporting the two most recent OS versions of those platforms. Distribution of these apps will be performed through the Apple App Store and Google Play Store per the respective platforms.
37. Mobile web support will be limited to iOS and Android devices using Safari or Chrome web browsers.
38. Some mobile functions, such as use of the device's camera, GPS position, and other features require that the user allow access for the app or mobile website in order to leverage the capability in question. If the user does not allow access, then the requested function will be disabled or unusable for that user.
39. Google analytics integration can be configured for the mobile version of Customer Portal. The mobile app would not use Google Analytics.
40. Browser support for web-based components of the solution will be based on Oracle's product support for particular browsers and versions of those browsers.
41. Prior to go-live, citizen-facing web components of the solution (Customer Portal) will be verified for ADA compliance using a W3C-recommended ADA compliance scanner. Violations will be remediated by AST until the scan returns no ADA violations.
42. A detailed Change Control Process will be a mutually agreed upon plan that specifies the approval process for any changes to the Statement of Work as defined in Appendix 4.

4.2.2 Technical Assumptions

43. The City and AST will jointly be responsible for determining the best method of creating interfaces for data flow to and from City's legacy applications needed to support City's Oracle CX solution. The City will be responsible for developing any programs required to extract the data from the legacy applications in the required format and any programs required to update City legacy applications with data from the Oracle CX applications.
44. AST bases the implementation scope on the requirements listed in the Functional Requirements, at a high level, in Appendix 5 City Requirements. In some cases, it may be technically infeasible to meet the requirements due to the lack of availability of data, controls/constraints of the SaaS

applications, or for other system architecture reasons. This infeasibility may not become apparent until the detailed Define/Model stage. In such cases, AST will provide help and guidance to the City concerning alternative methods to meet its business requirements, such as implementing process changes, manual steps, or alternative functionality.

45. AST will assist the City in performing data mapping exercises to enable the City for proper data extraction for data migrations. It will be the responsibility of City to extract the data from its current legacy systems and to perform any data cleanup required before migrating the data to Oracle CX applications. Data required for conversion will be provided in the format that can be consumed by Oracle SCX applications data import processes.
46. The City will verify converted data and be primarily responsible for conversion error recognition and resolution. AST will provide the City with assistance and guidance for leveraging analytics reports or APIs to perform that validation process.

4.2.3 Project Plan Assumptions

47. Due to federal tax laws, consultants traveling for long periods to the same project site must be re-assigned after twelve (12) months. They will be transferred to work on an unrelated project for twenty-two (22) consecutive business days. AST in consultation with the City will make the decision regarding how best to handle any issues.
48. The AST Team will generally work a 4-day onsite work week. Work will also be performed remotely.
49. The AST Team will honor all holidays observed by the City, although, with permission, may choose to work on holidays and weekends when appropriate.

Appendix 1 Scoped Interfaces

1	ArcGIS	Display mapping and leverage geospatial data.	Oracle Service Cloud	Permanent	Bidirectional	Oracle CX Agents and Contacts
2	Official Payments	Payment processor	Oracle Service Cloud / Oracle Policy Automation	Permanent	Outbound from OSvC	Oracle CX Contacts
3	Master Address List	City's Master Address List	Oracle Service Cloud	Permanent	Outbound from OSvC	Oracle CX
4	City's GIS MapService	Waste Pickup Data	Oracle Service Cloud	Permanent	Outbound from OSvC	Oracle CX
5	TEAMS	Traffic Engineering Asset Management System	Oracle Service Cloud	Permanent	Bidirectional	Traffic Engineering
6	FieldSeeker		Oracle Service Cloud	Permanent	Bidirectional	Mosquito Control
7	BIDS	(Building Inspection Division System)	Oracle Service Cloud	Permanent	Bidirectional	Building Inspection Division
8	PICS	(Property Inspection and Contract Solution)	Oracle Service Cloud	Permanent	Bidirectional	Municipal Code Compliance
9	Chameleon		Oracle Service Cloud	Permanent	Bidirectional	Animal Care and Protective Services

10	Maximo/Tivoli		Oracle Service Cloud	Permanent		Public Works for Grounds Maintenance, Right of Way, Streets, and Drainage, Public Buildings, Mowing and Landscape, Parks and Recreation, and Fleet Management
11	City Link		Oracle Service Cloud	Permanent		Citywide
12	Jax Score		Oracle Service Cloud	Permanent		Citywide
13	Business Intelligence		Oracle Service Cloud			Citywide
14	CARE	Current CRM System	Oracle Service Cloud	Temporary	One-Way	Citywide

Appendix 2 Scoped Data Conversions

Conv-1	Contact Data	Oracle Service Cloud	Contact Master	Convert CSV or similar flat file into Oracle Service Cloud Contact objects. • Name Fields • Address Fields • Telephone Fields • Email
Conv-2	Incident Data	Oracle Service Cloud	Legacy CRM	Convert CSV or similar flat file into Oracle Service Cloud Incident object or Custom Business Object (CBO), based on the proper determination of the project team for best practices. • Subject • Product / Category • Status • Severity • Related Contact • Threads

Appendix 3 Deliverable Acceptance Certificate

EDM
Enterprise Domain Model

EDM.910 – Acceptance Certificate

City of Jacksonville Oracle CX Implementation

Deliverable Type	Deliverable Description
☐ *Proposal/Change Order* ☐ *Project Plan* ☒ *Project Phase* ☐ Application Module ☐ *Business Process* ☐ *Program Unit* ☐ Speciation/Documentation ☐ *Training*	**<<Deliverable Name>>** <<Deliverable Description>>

The above deliverable has been reviewed by the undersigned and fully meets the project deliverable acceptance criteria.

Approved By

Date	Name	Title	Signature
<Date>	<<Name	City Project Manager	
<Date>	<<Name	AST Project Manager	

Appendix 4 Project Change Control Process

Any change in scope of the project as described in the Statement of Work, or changes that would affect the scope, timeline, resources or cost would be processed using this Project Change Request (PCR) process. This would include:

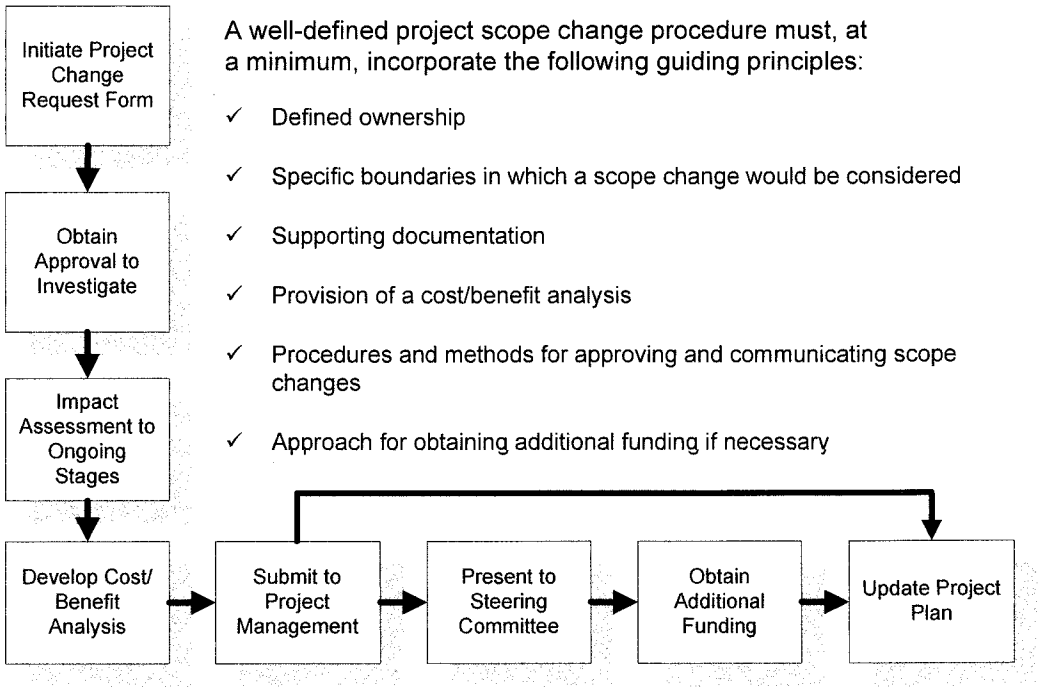
- Custom Components like Interfaces, Custom Reports etc. Amendments
- Additional Reporting
- Other Changes

For each customization and extension that gets approved, the following will be provided:

- Functional Design
- Technical Design
- Test Scripts

The PCR contains a description of the desired change, the business reason for the change, alternatives to the desired change, and estimates of resources, time, and/or cost to incorporate the change as well as any other pertinent information. This will allow City to make a decision whether to approve and incorporate the change into the project or not.

The framework for the change control process is illustrated in the following diagram.



- A PCR will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the project. It will also include the scope of the change, a description of the activities to be completed as part of the project change request, an outline of the responsibilities of the parties involved and the estimated level of effort (and cost) to complete.

- The City Project Manager shall be authorized on behalf of City to approve Change Orders that do not increase the cost of the Project or delay the completion of the Project.
- If a change request has an impact on budget or schedule, it will be presented to the City steering committee for approval. The steering committee will determine whether the benefits of the proposed change merit the investment, and whether they are willing to provide additional funding. Resolution (acceptance or rejection) of the PCR will be documented on the PCR in the Resolution section.
- If approved, a written PCR will be signed by both AST and City Project Managers to authorize implementation of the requested change.
- Approved PCR's will be incorporated into the project budget and the project work plan and assigned to the appropriate resources.
- Upon receiving an approved Change Order, AST shall promptly commence performing the Services described in the Change Order.

The change control form template is attached below.

Requestor : *<name of person requesting change>*	**Request Date** : *<Enter Date>*
Change # : *<Reference for CC Master List>*	**Target Release:** *<Enter Date>*
Priority : *<Indicate high, low or medium Priority>*	

Functional Area:

Description of Change:

<This section may be a cross-reference to a spec but a summary should nevertheless be contained here>

Reason for Change:

Impact if not implemented:

Alternative Solutions:

<State if alternate solutions were considered>

Recommendation Solution:

<State the proposed solution with reason for choosing the same>

Schedule Impact:

Milestone/Task	Orig. Date	New Date	Change
Resource impact			

Cost Impact • **Documentation** • **Development** • **Testing**	

Approvals:			
Name	**Title**	**Initials**	**Date Approved**

Appendix 5 City Requirements

The following table lists the City's requirements for the 311 solution. Requirements that have been highlighted in yellow color have been identified by AST and the City as out-of-scope for the project and will not be delivered by AST as part of the implementation effort.

Reference Number	Functional Requirement Description	Module: - Web Customer Service - Cross-Channel Contact - Knowledge Management - Policy Automation	Oracle Product(s)
	Case Management Requirements		
CM4.1.1	The solution provides the ability to capture and track requests.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.2	The solution provides the ability to identify duplicate records based on business rules (i.e., by type, date range, and physical location).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.3	The solution requires user confirmation of a deletion.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.1.4	The solution provides a system generated unique service transaction number (identifier) after a service request is created.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.5	The solution provides the ability to enter a request anonymously based on service request type and business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.6	The solution provides conditional scripting logic (i.e., for targeting the right questions based on previous answers). Not branch logic requiring the selection of the next button.	Policy Automation	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.7	The solution provides the ability to "clone" customer incidents and establish parent/child relationship between related incidents.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.8	The solution provides a unique identifier for each service request beginning with the year.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.9	The solution provides the ability to record activity notes related to a request that is unlimited in length and provides scrolling capabilities for viewing.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.10	The solution provides the ability to track the origin of the request.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.11	The solution provides the ability to automatically assign a priority code, based on transaction type per business rules (i.e., allows override).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.1.12	The solution provides a limited number of clicks and flexible issue entry.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.13	The solution provides context-sensitive online help prompting when a procedure is incorrectly executed.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.14	The solution provides a unique identifier for each customer so that all requests and contacts from a customer may be linked (i.e., for the purpose of providing a history for that customer).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.1.15	The solution limits clicks and includes the mouse over or hover functionality – Allows a user to hover over a field to view the limited information without requiring the user to click to open the record.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Configuration Requirements		
CM4.2.1	The solution provides the ability to create and define service request type based on business rules (e.g., service level agreement (SLA), scripting, conditional questions, keywords, custom fields).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.2	The solution provides the ability to define data fields to be required or visible depending on the service request type (e.g., by selecting a service request type it would display specific fields, based on business rules).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.3	The solution provides the ability to add/remove/update citizen alert announcements.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.2.4	The solution provides the ability to create, modify, delete, and archive scripts.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.5	The solution provides administrative functionality for contact information for name correction, duplicate checking, and merging.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.6	The solution provides the ability to define the choices for each list of values which is used when answering questions during intake and resolution.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.7	The solution provides the ability to define and maintain transaction types and department and division codes (e.g., route transaction to correct dept. /Person).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.8	The solution provides the ability for each department to define the resolution activities with unique duration in days and hours to a service request type.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.9	The solution provides the ability to define the default values to be automatically set when a service request is created.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.10	The solution provides the ability to define and edit messages that can be sent /triggered by activities and status updates.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.11	The solution provides the ability to configure message types to be sent at a particular time after an activity is created.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.2.12	The solution provides the ability to define overdue assignment message(s) and the number of days to complete.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.13	The solution provides the ability to make a photo private or public.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.14	The solution sends automatic closure notification via the customers preferred communication channel.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B68548 Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity
CM4.2.15	The solution provides the ability to maintain existing data while making additional modification to the record.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.2.16	The solution limits clicks and includes the mouse over or hover functionality. For example: allows a user to hover over a field to view limited information without requiring the user to click to open the record.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Schedule Requirements		
CM4.3.1	The solution provides the ability to set an appointment and automatically inform the citizen via the citizen's preferred method of contact including phone, email, letter and text (short message service (SMS)).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.3.2	The solution provides the ability to change an appointment time and automatically notify the citizen via a preferred method of contact.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.3.3	The solution provides the ability to set limits of appointments based on configurable parameters (i.e., limit number of appointment slots.)	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.3.4	The solution provides the ability to see the waste hauler information and collection schedule with limited clicks before creating a request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Script Requirements		
CM4.4.1	The solution provides a facility to create process scripts, or a similar function, to guide users through a service request, prompting collection of all necessary information to process a request.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service
CM4.4.2	The solution provides the ability to set an expiration date for a script/checklist.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service
CM4.4.3	The solution provides the ability to send a reminder to the script owner when an expiration date is reached.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service

CM4.4.4	The solution provides the ability to record the owner and/or author of the script or checklist.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service
CM4.4.5	The solution provides the ability to define the script questions to be displayed. Additional functionality related to the script questions to include:		B78442 Oracle Policy Automation Collaboration Cloud Service
CM4.4.5.1	Ability to select and relate script questions to transactions or activities.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service
CM4.4.5.2	Ability to define script questions as non-updateable.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service
CM4.4.5.3	Ability to provide multiple answer types for the script questions.	Cross-Channel Contact Center	B78442 Oracle Policy Automation Collaboration Cloud Service
	Create Request Requirements		
CM4.4.6	The solution provides the ability to select the service request type.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.7	The solution provides the ability to enter follow-up calls.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.8	The solution provides the ability to add a comment to a service request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.9	The solution provides the ability to transfer the request to another group.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.4.10	The solution provides the ability to capture Citizen's contact information (e.g., first name, middle name, last name, requestor title, address, contact number, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.11	The solution provides fields to capture first name, middle name, last name, address, and the title of the requestor.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.12	The solution provides the ability to record a customer type or category, such as: citizen, business, contractor, elected official, agency, etc.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.13	The solution provides users with the ability to link service request if they are interrelated (i.e., when there are multiple requests for the same issue addressed by different work groups). Ability to link multiple issues together.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.14	The solution provides the ability to record and view all updates to customer service requests and personal data.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.15	The solution allows the entry of multiple requests from a single call without reentering profile data.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.16	The solution auto-populates fields based on previous calls or other known data from the customer profile.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.17	The solution provides the ability for a service request to allow distinction between initial or follow-up inquiry.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.4.18	The solution provides the ability to force the required entry of fields based on service request type.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.19	The solution provides the ability to add additional information regarding the exact location of the service request issue (e.g., the actual location of plumbing or downed tree).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.20	The solution provides the ability to add/change information in the intake form at a later date (e.g., customer calls back).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.21	The solution provides the ability to create parent-child relationships so multiple service requests may be linked to a master request, limiting duplicate issue entry.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.22	The solution provides the ability to create a follow-on action without generating a new service request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.23	The solution provides the ability to identify the user who attached a document.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.24	The solution provides the ability to record the person making an activity note entry based on User ID.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.4.25	The solution provides the ability to link to documents that may be stored in other systems (e.g., providing policy documentation).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.26	The solution provides the ability to auto-populate data into a notes or comments field (e.g., predefine notes).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.27	The solution provides standardized drop-down menus (e.g., call reasons, pending reasons, enforcement of required fields, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.28	The solution allows the Customer Service Representative (CSR) to change service type without losing the additional data (e.g., notes, name, and address).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.29	The solution provides the ability to assign multiple tasks simultaneously within multiple workgroups.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.30	The solution provides the ability to email service requests to departments (External Agency) that are not users of the CRM system.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B68548 Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity

CM4.4.31	The solution provides the ability to set creation options for secondary types of service requests that can be automatically created and linked to the original service request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.4.32	The solution provides the ability to embed email thread to the corresponded service request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Address Requirements		
CM4.5.1	The solution shall display all open service requests within the request screen when the agent enters an address.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.2	The solution provides the ability to display recently closed and transferred service requests when the agent enters an address.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.3	The solution provides the ability to display complete call history when the agent enters an address and/or name.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.4	The solution provides the ability to validate address entry against a master address list.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.5	The solution provides the ability to record issue location as an address, intersection latitude/longitude coordinates, real estate number or within a block address.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.5.6	The solution provides the ability to verify (flag) addresses or locations as the City of Jacksonville addresses or locations, where applicable.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.7	The solution provides the ability to enforce the use of standard abbreviations for roads against a master address list.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.8	The solution provides the ability to suggest street name spellings against a master address list if a possible incorrect spelling is detected.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.9	The solution provides the ability to allow and validate partial address or location entry against a master address list.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.5.10	The solution provides the ability to record a non-address specific location, such as intersection, corner, etc., against a master address list.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.11	The solution provides the ability to enter for multiple addresses per transaction. Each address entry must be assigned a type code (e.g., reporting address, problem location, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.5.12	The solution provides the ability to standardize address entry for consistency.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Format Requirements		
CM4.6.1	The solution provides the ability to attach a document, picture, video and/or file of various types for a request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
CM4.6.2	The solution provides the ability to attach forms (such as PDF) and other documents (e.g., pictures) to the requests.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

CM4.6.3	The solution displays whether or not a request has an attachment.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
CM4.6.4	The solution provides the ability to send forms/articles/documents to the citizen.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B68548 Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity
CM4.6.5	The solution provides the ability to view documents in their native format without having the original application loaded on the viewer's computer.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.6.6	The solution provides the ability to store emails or other electronic documents associated with a specific case.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.6.7	The solution provides the ability to allow attachment of documents to cases or interactions up to a set limit defined per City's business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
	Search Requirements		
CM4.7.1	The solution provides robust search functionality.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CM4.7.2	The solution provides the ability to search and report on data associated with service requests (e.g., by agent, citizen contact information, address/location, and/or service request type, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.7.3	The solution provides Frequently Asked Questions (FAQs) that are definable and searchable (e.g., knowledge base articles).	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CM4.7.4	The solution provides the ability to create user-defined fields to allow the following functionality:		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CM4.7.4.1	Ability to search	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.7.4.2	Ability to define default values	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.7.4.3	Ability to edit rules	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.7.5	The solution provides the ability to display notes in reverse chronological order.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.7.6	The solution provides the ability to sort notes dynamically by date or by a person who made the note.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CM4.7.7	The solution provides drill-down lists within a transaction that may be maintained with the values used by the City to describe various problems. The list that displays to the operator will vary by transaction type.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Date Requirements		
CM4.7.8	The solution provides an automatically default to the current date with the ability to override, per the business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

CM4.7.9	The solution provides automatic date/time stamp by User ID for all activity.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CM4.7.10	The solution provides automatic date/time stamp on note entries.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CM4.7.11	The solution provides automatic date/time stamp on attachment entries.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CM4.7.12	The solution provides the ability to accept requests or inquiries and track those requests from multiple sources including: • In person • By phone • By mail • By fax • By email (e.g., Gmail, Yahoo) • Intranet and Internet • Via smartphone (e.g., iPhone, Android) • Via tablet/pad (e.g., iPhone Pad, Samsung Galaxy, Microsoft Surface) • Social Media (e.g., Twitter, Facebook)	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly B88386 Oracle Social Cloud, Basic – Production Environment
	Workflow Management Requirements		

WM4.2.45	The solution provides the ability to automatically or manually assign staff, inspectors, or work crews by department or work division area (geographically).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
WM4.2.46	The solution provides the ability to enter notes on a case that will describe actions taken by the fieldworker. Notes will be a free-form text entry that is unlimited in length based on business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

WM4.2.47	The solution provides the ability to track every task by date or activity on record regardless of status.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
WM4.2.48	The solution provides flexibility and on demand sorting of the work queue by fields such as but not limited to: transaction type, date, and priority.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

WM4.2.49	The solution provides the ability to establish SLAs for each of the steps in a request that is sent to multiple departments.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
WM4.2.50	The solution provides the ability to escalate requests manually added automatically based on predefined escalation rules (e.g., when an SLA expires).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

WM4.2.51	The solution provides automatic escalation to supervisor(s) for past due, emergency, high visibility/urgent requests or large volumes of requests.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
WM4.2.52	The solution provides the ability to push alerts to mobile devices.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

WM4.2.53	The solution provides the ability to send alerts to the assigned supervisor when off balance workloads are assigned to a workgroup or a resource.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
WM4.2.54	The solution provides the ability to support real-time and batch update processing. (See: Section 5 Exhibit 1A)	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

WM4.2.55	The solution provides incoming email routing to the appropriate workgroup based on business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Knowledge Base Requirements		
KB4.3.1	The solution provides the ability to subscribe or unsubscribe to the knowledge base or FAQs changes.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.2	The solution provides the ability to display top issues with KPI functionality (e.g., ability to pull metrics, statistic, etc.).	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.3	The solution provides an online contact directory for commonly requested non-City agencies.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

KB4.3.4	The solution provides the ability for admin to create knowledge articles and FAQ's.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.5	The solution provides the ability to update and sync centralized knowledge base.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.6	The solution provides admin functionality (e.g., to update/modify, workflow options, approval process of new content, send notification of changes, etc.).	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.7	The solution provides version control with the ability to roll back to previous historical articles.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.8	The solution provides the ability to organize knowledge base items into workgroups (e.g., departments, agencies or other organizational units).	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

KB4.3.9	The solution provides the ability to report most viewed articles.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.10	The solution provides the ability to report rated articles.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.11	The solution provides the ability to report most popular articles.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.12	The solution provides the ability to report most popular categories.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.13	The solution provides the ability to report most popular search queries.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

KB4.3.14	The solution provides the ability to report on articles per author, by date and category.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.15	The solution provides web indexing functionality.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.16	The solution provides the ability to update directly to set and purge time sensitive events and to optionally set expiration dates for FAQs and knowledge articles.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
KB4.3.17	The solution provides the ability to report most popular failed search queries.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
	Analysis and Reporting Requirements		
AR4.4.1	The solution provides the ability to produce a wide variety of Business Intelligence (BI) reporting content.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.2	The solution provides the ability to identify requests that are nearing their service level agreement (SLA).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.3	The solution provides the ability to identify requests that have exceeded their service level agreement.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.4	The solution provides wizards to help guide the report writing process.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.5	The solution provides the ability to track the number of customer access attempts via all access channels (e.g., mobile, web, phone, social media).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.6	The solution provides a report writer that contains the author, users, and date of most recent updates.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.7	The solution provides the ability to flag reports or certain elements of the report as confidential and set permissions for access to reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.8	The solution provides the ability to generate letters with appropriate formatting for mailing or sending via email.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.9	The solution provides a data dictionary.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.10	The solution has the ability to run reports without impacting system performance levels.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.11	The solution has the capability to perform calculations.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.12	The solution provides the ability to create "flags" on specific fields that are identified based on business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.13	The solution provides the ability to generate reports based on citizen surveys.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.14	The solution provides the ability to aggregate data into hourly, daily, monthly and annual statistics.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.15	The solution provides the ability to print requests, complete with all or selected information associated with the requests, including history, cases, attachments, and notes.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.16	The solution provides the ability to view a high-level summary of a customer's history, with the ability to drill down to view details of individual service requests.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.17	The solution has the capability to drill down on data contained in the dashboards.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.18	The solution has the capability to drill down on data contained in all reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.19	The solution provides dashboard functionality.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Reporting Creation Requirements		
AR4.4.20	The solution provides the ability to generate reports and audit trails for all data changes (e.g., date and timestamp, username, from/to values, attachment of documents).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.21	The solution provides the ability to: create, modify, save, filter, sort, set date parameters, incorporate conditional logic, etc.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.22	The solution allows query selection criteria to be named and saved for future use.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.23	The solution allows newly defined reports to be added to the product's menus.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.24	The solution provides the ability to produce reports using the wizard or templates.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.25	The solution provides the ability to create status reports based on user defined criteria.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.26	The solution provides the ability to include statistical charts and graphs in the reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.27	The solution provides the ability to report on: the number of open cases, number of cases closed, average time cases were open, number of cases escalated, etc.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.28	The solution provides the ability to create reports that aid in determining what information can be archived.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.29	The solution provides the ability to generate reports based on a set of key performance indicators as designated by the City, including statistical reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.30	The solution provides enterprise-wide reporting capability showing performance across all departments that utilize it.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.31	The solution provides statistical reports that show a detailed snapshot across various performance measures during the time period selected.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.32	The solution allows report results to be viewed in graphical format.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.33	The solution allows report results to be viewed on a map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.34	The solution provides the ability to utilize pivot tables in the reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.35	The solution allows querying on multiple parameters and within fields.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.36	The solution has the ability to report on specified fields in a mobile environment.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.37	The solution provides the ability to create a report based on user defined grouping criteria (e.g., geography, chronology, and type of work).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.38	The solution provides the ability to generate adhoc reports that will allow parameter driven selection, ascending or descending sorting of the specified fields, and conditional logic.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.39	The solution provides the ability to produce tabular reports based on user defined criteria.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.40	The solution provides the ability for users to define the time interval for a report (e.g., daily, month-to-date, month-end, quarterly, year-to-date and annually).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.41	The solution provides the ability to produce management reports for service request and case management counts in tabular and graphical reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.42	The solution provides the ability to create queries and reports based on request type, geographical area, date or time.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.43	The solution provides the ability to generate reports with computed fields (e.g., variances, percentage, and statistics).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.44	The solution provides the ability to search the database for transactions that fall within user-specified parameters or user specified conditional logic (and/or).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.45	The solution provides the ability to search the database for transactions that include specified keywords or phrases.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.46	The solution provides the ability for all reports to be date sensitive, including the ability to print/run for prior year's data, fiscal year, calendar year, date range (e.g., Event reporting).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.47	The solution provides the ability to regenerate/reprint a report that was previously generated.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.48	The solution provides the ability to schedule automatic reports via email to an individual or group of individuals.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.49	The solution provides the ability to track and report requests by origin, such as in-person, email, phone, or the web.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.50	The solution provides the ability to forward reports, letters, or messages via email to an individual or group of individuals.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.51	The solution allows for scheduling of predefined reports that can be waiting for the staff or pushed to them via email on demand, monthly, weekly, etc.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.52	The solution provides the ability for report data to be formatted and exported to products such as Word, Excel and PDF.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.53	The solution provides the ability to connect to third party software such as SQL Server Reporting Services (SSRS).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

AR4.4.54	The solution provides the ability to incorporate text and or images (e.g., GIS information or pictures) within a report.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.55	The solution provides the ability to incorporate maps into reports of analytical data.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.56	The solution provides the ability to store copies of the correspondence sent in an electronic/digital format.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.57	The solution provides the ability to search and report on data associated with service requests such as agent, citizen contact information, address, FAQ article, special event, issue status and/or request type.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.58	The solution provides transaction auditing, including but not limited to: time, date, user, field changed, etc.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.59	The solution provides the ability to allow one or more users to query information and run reports at the same time.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
AR4.4.60	The solution at a minim logs time, date, user, field changed, pre-change content, and post-change content.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Customer Satisfaction Requirements		

CS4.5.1	The solution provides the ability to create a survey.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CS4.5.2	The solution provides the ability to automatically send a citizen satisfaction survey based on request type within a user-defined time frame via the web, mobile or email.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CS4.5.3	The solution provides the ability to easily modify the survey questions.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CS4.5.4	The solution provides the ability to import contact information of the survey participants (e.g., via an Excel spreadsheet).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CS4.5.5	The solution provides the ability to add URL links to external web resources.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

CS4.5.6	The solution provides the ability to send a web invitation via email and/or SMS.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CS4.5.7	The solution provides the ability to display a thank you message upon submitting.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
CS4.5.8	The solution provides survey template reports.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CS4.5.9	The solution provides the ability to link results to the specific employees providing the service (i.e., the person who entered the request, the person who performed the work and anyone that documented contact with the customer).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CS4.5.10	The solution provides the ability to create a survey participant group based on business rules (e.g., only survey completed animal requests).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

CS4.5.11	The solution provides the ability to configure rules and conditional questions. The next question may change based on the customer's response to the previous question.	Policy Automation	B78442 Oracle Policy Automation Collaboration Cloud Service B86965 Oracle Policy Automation Agent Cloud Service Collaboration Cloud Service B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
CS4.5.12	The solution provides the ability to report on the results. It should include the ability to link comments (e.g., to a specific request, customer, employee, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
CS4.5.13	The solution provides the ability to create the following question types: five- point scale, yes or no, multiple choices, true or false, open-ended.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
	Mobile Application Requirements		

M4.6.1	The mobile app solution shall provide the ability to report issues and submit a request via a Mobile Device.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.2	The mobile app solution shall provide address mapping.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.3	The mobile app solution shall provide the ability to attach photos and other attachments.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.4	The mobile app solution shall provide requested confirmation (e.g., confirmation request ID).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.5	The mobile app solution shall provide the ability to monitor requested status.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.6	The mobile app solution shall provide the ability to elect a method of receiving notifications (e.g., email, automated phone or short message service (SMS), etc.).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.7	The mobile app solution shall provide the ability to send updates automatically based on the customer's selected notification method.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.8	The mobile app solution shall provide the ability to view additional information (e.g., events, links, etc.).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.9	The mobile app solution shall provide an automatic dialer function.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.10	The mobile app solution shall provide the ability for a customer to provide feedback.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.11	The mobile app solution shall provide the ability to reset the password.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.12	The mobile app solution usage must be available for reporting purposes.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.13	The mobile app solution shall provide a method to verify accurate street addresses and locations based on the City's standardized address listing /GIS data.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.14	The mobile app solution shall provide the ability to select service request types set up as the parent/child relationship with multiple child levels.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.15	The mobile app solution shall provide the ability to only display the child level of associated parent service request type from the drop down list.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.16	The mobile app solution shall provide integration with the core CRM application so that any service request configuration changes made in the core CRM application are automatically updated in the mobile application.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.17	The mobile app solution shall provide the ability to integrate with the CRM software via a bidirectional exchange.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.18	The mobile app solution shall provide ongoing maintenance and enhancements/releases/upgrades to ensure functionality and device compatibility.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.19	The mobile app solution shall provide the ability to be branded with the City of Jacksonville branding/logo.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.20	The mobile app solution shall provide a help function within the application.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.21	The mobile app solution shall provide the ability to download at no charge for all of the most common smartphone platforms (e.g., iOS, Android, Blackberry, OS, Windows, etc.).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.22	The mobile app solution shall provide the ability to specify a location such as: a street address/subunit, address range along a street segment, an Intersection, or commonplace/landmark.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.23	The mobile app solution shall capture the latitude and longitude data.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.24	The mobile app solution shall provide the ability to inform the user that the address field is not a recognized street address.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.25	The mobile app solution shall provide the ability to create and modify the body or email, text, confirmations, alerts messages based on the selected service request type per business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.26	The mobile app solution shall provide the ability to submit a request to be automatically routed to the assigned Dept./Div. workgroup for prompt resolution based on the City's business rules as defined in the CRM system.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.27	The mobile app solution shall provide the ability to respond to a previously submitted request.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.28	The mobile app solution shall provide the ability to select a place on the map and save it under "Favorite Places" tab.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.29	The mobile app solution shall provide the following configurable buttons from the home page to include, but not limited to: Submit a Request / Report, Flight Blight; Call Us, News, Social Media.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.30	The mobile app solution shall provide the ability to configure and display links. Examples: • News Feeds: www.coj.net/all-of-coj/news.aspx www.coj.net/CMSPages/coj_newsRss25.aspx • Social Media: www.coj.net/departments/public-affairs/social- media	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.31	The mobile app solution shall provide the ability to auto populate the City's Call Center phone number 904-630-2489 to the mobile device when the "Call Us" is selected from the home.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.32	The mobile app solution shall provide the ability to create, edit an account and verify an email account.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.33	The mobile app solution shall require the following information to be completed by the registrar: first name, last name, email address and password when creating an email account.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.34	The mobile app solution shall provide the ability to verify email address with an email acknowledgment as confirmation.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.35	The mobile app solution shall display the following information: Terms of Use, Privacy Policy, and Application Version Number.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.36	The mobile app solution shall provide statistical reporting or querying of service request data for the purposes of analysis, forecasting and auditing (e.g., the City must be able to determine the source of each request and option selection of the requestor).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.37	The mobile app solution should only consume data and GPS while actively in use.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.38	The mobile app solution electronically links external sources of information, including passing a parcel identifier, x-y coordinate or other information needed to look up and supply information relative to the location.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.39	The mobile app solution shall provide the ability to update service request from a wireless device.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.40	The mobile app solution shall provide the ability to indicate if the service request type is private (internal) or public.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.41	The mobile app solution shall provide the ability to manage assignments from the field (e.g., reassign work, cancel assignments, initiate a service request, task lists based on user log on ID, etc.).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.42	The mobile app solution shall provide the ability to transmit a notification alert to or from a mobile device when service requests are reassigned.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.43	The mobile app solution shall display assigned issues on a map based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.44	The mobile app solution shall provide the ability to configure drop down conditional questions per service request based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

M4.6.45	The mobile app solution shall provide the ability to display a descriptive explanation of the service request type upon selection based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
	Mobile Application Requirements - Optional		

M4.6.46	The mobile app solution allows for Google analytics.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
	Blight Requirements		

M4.6.47	The mobile app solution shall provide a Blight function to create requests and report blight-related issues.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.48	The mobile app solution shall provide the ability to select a category and subcategories service request description from a drop down list.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

M4.6.49	The mobile app solution shall provide the following service request to be selectable based on business rules. • Blight a) Abandoned Vehicle b) Illegal Dumping on Private Property c) Illegal Dumping on Public Property d) Illegal Snipe/Bandit Sign e) Trash/Litter Over Majority of Property f) Unsanitary Conditions g) Weeds/Grass Over 15 inches h) JTA Bus Stop Issues • Dead Animal in City Right of Way • Missed waste collection a) Garbage b) Recycling c) Yard Waste • Mosquito Inspection or Spray • Schedule Collection a) Appliance Pick-Up b) Tire Pick-Up • Sidewalk Hazardous or Missing	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.50	The mobile app solution shall provide GPS functionality to specify the location of the incident/request.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

M4.6.51	The mobile app solution shall allow the ability to change the GPS map type to Street, Hybrid or Satellite View.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.52	The mobile app solution shall provide the ability to specify the location using the following methods. • The mobile device GPS • Manually enter the address • Drag-and-drop a pin on the map Note: Address/location must be within Duval County	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.53	The mobile app solution shall provide the ability to save the addresses as Favorites, view Favorites and select from Favorites to report the location of the issue.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.54	The mobile app solution shall provide the ability to attach photos or other document attachments to open or closed service request.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

M4.6.55	The mobile app solution shall provide the ability to display a confirmation upon creation of service request with the following: request number, service request type, date and time created, issue location, issue status, etc.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.56	The mobile app solution shall provide the ability to view the following information request type, date & time created, issue location, and status of the open or close request submitted by the requestor.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.57	The mobile app solution shall provide the ability to automatically send updates via phone voice and/or phone text messages to the requestor when updates are made to the issue (if the requestor elected to receive voice/text updates).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.58	The mobile app solution shall provide the requestor the ability to choose which notification method from the following: email, phone (voice), and text message, alternate phone (text message) to receive when updates are made to their issue.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

M4.6.59	The mobile app solution shall include the following information when sending notification to the requestor: request number, service request type, date and time created, issue location, issue status, etc.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.60	The mobile app solution shall provide the ability to schedule a collection for tires and appliances.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.61	The mobile app solution shall display the citizen yard & garbage pick-up days based on their address. Note: The Collection Type and Schedules are retrieved from the City GIS REST MapService.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.62	The mobile app solution shall provide the ability to add reminders to requestor's mobile device calendar for trash, yard waste and recycling pickup days.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

M4.6.63	The mobile app solution shall provide the following tab web links on home page screen: • Report Blight & take a picture • Schedule collection for tires, & appliances • Dates for trash, yard waste, & recycling pick-up • Fight Blight Events • Examples of Blight Note: List of items subject to change	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.64	The mobile app solution shall provide the ability to select and launch the following blight-related information in map form with possible GIS data attributes from the home page: • Report Blight & take a picture • Schedule Collection for tires, appliances • Dates for trash, yard waste, & recycling pick-up	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
M4.6.65	The mobile app solution shall provide the ability to select and launch the following blight-related information web links from the home page: • Fight Blight Events http://www.coj.net/neighborhood-blight/events.aspx • Examples of Blight http://www.coj.net/neighborhood-blight/examples-of-blight.asp	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
	Geographic Information System (GIS) Requirements		

GIS4.7.1	The solution shall include a GIS component or integrate with the City's GIS solution.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.2	The solution provides the ability to access GIS data attribute and applications from the intake, resolution, or query functions based on business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.3	The solution provides the ability to display related service request types on a map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.4	The solution provides the ability to locate an issue based on the street address (by parcel or sub-unit point feature), street segment, or intersection.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.5	The solution provides the ability to display service requests and associated data (e.g., service request number, status, a short description, etc.) on the same map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.6	The solution provides the ability for service request addresses and locations to be verified against official City addresses.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.7	The solution provides the ability to visually see GIS location information (e.g., building, intersection) from a remote device.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.8	The solution provides the ability to display GIS data using ArcGIS Server Services on a map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.9	The solution provides the ability to print, zoom in, zoom out, and pan a map image.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.10	The solution provides the ability to use the City's GIS data for all geospatial applications within the CRM solution.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.11	The solution provides a real-time database view of issues that include x and y coordinate values.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.12	The solution provides the x and y coordinate values in decimal degrees precision of 6-8 decimal places in WGS_1984_Web_Mercator_Auxiliary_Sphere.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.13	The software provides the ability to successfully integrate with Esri ArcGIS Server v10 or higher.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.14	The solution provides the ability for maps to be accessed from a mobile device (e.g., smartphone, tablet, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.15	The solution provides the ability to load the maps within a specified period of time as established by the City.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.16	The solution provide a method to verify accurate street addresses and locations based on the City's standardized address listing/GIS data.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.17	The solution provides the ability to search for an address and zoom to the location.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.18	The solution provides the ability to enter a service request via the internet, allowing the requestor to record an address and have the address validated and displayed on a map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.19	The solution provides the ability to inform the user that the address field is not a recognized street address.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.20	The solution provides the ability to enter a service request via the internet, allowing the requestor to select a location of an incident on a map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.21	The solution provides the ability to query from the mapping screen itself using a simple drawing tool or by pre-selected query of a GIS layer based on this attribute information.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.22	The solution provides the ability to perform basic map viewing functions including displaying, querying, and analyzing dynamic map data in the CRM map display window.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.23	The solution provides the ability to locate, link and/or attach GIS maps/ overlays or images to a customer service request as prescribed by the user.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.24	The solution provides the ability to directly connect service requests to parcels, which are stored in the GIS.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.25	The solution provides the ability to group by any combination of the following: User defined boundaries (district, zone, etc.) • Service request types • Status • Priority • Department • Location • Condition of assistance • Etc.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.26	The solution provides the ability to pinpoint the location of the service call on a map, by address or a parcel base and then fine tune the location using map features.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.27	The solution provides the ability to format maps with ease of use (e.g., adding layers and assigning colors or symbols).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.28	The solution provides the ability to identify and query nearby requests on a map which are coded by the service request from call centers, request for service and/or case views.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.29	The solution provides the ability to view open requests via a GIS display for all cases, symbolized by one or more attributes.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.30	The solution provides the ability to use GIS mapping to assist managers in consolidating service requests and organizing work crews.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.31	The solution provides the ability for a Contractor to create a query function that resides in the CRM map window allowing the selecting of a predefined geographical area or selecting an area by drawing a polygon.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.32	The solution provides the ability for users to modify scale, size and print maps generated from the CRM application to display service request query results locations.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.33	The solution provides the ability for users to query service requests previously entered into the system using various selection criteria and see the query result locations on a map.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.34	The solution provides the ability to upload and display topographical or aerial maps to help City personnel locate and understand the nature of a request.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
GIS4.7.35	The solution should not include a Flex or Silverlight based application.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

GIS4.7.36	The solution provides the ability to add categories to net layers if they are too numerous.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
	Web Self-Service Requirements		
WS4.8.1	The solution provides a public website to be accessed from the City's home page.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.2	The solution provides the ability for the public website to interface to the CRM database and route the transactions to the appropriate work queues based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.3	The solution shall post web entries as real-time transactions to the CRM database.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

WS4.8.4	The solution provides a public website that supports the latest two versions of web browsers, including but not limited to Mozilla, Firefox, Internet Explorer, Chrome, etc.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.5	The solution provides a public website that is in compliance with the American with Disabilities Act (i.e., ADA compliant).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.6	The solution provides the ability for citizens to create their own profile including a login User ID and Password based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

WS4.8.7	The solution provides self-service password reset functionality based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.8	The solution provides the ability for a citizen to submit and track requests anonymously based on request type and based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.9	The solution provides the ability to allow a citizen to access service requests by using a Request ID.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.10	The solution provides the ability to validate addresses entered by a citizen on a self-service request against the City's database.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

WS4.8.11	The solution provides the ability to allow citizens to review the status of a service request or their service request history via the public website.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.12	The solution provides the ability for the public website to allow the citizen to enter a word or phrase to navigate to the correct service request type or view a list of departments.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.13	The solution provides the ability to auto-suggest service request content based on the type of request being created via the web or mobile.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.14	The solution provides the ability to automatically send an email to the citizen upon submission of a request through the public website to acknowledge receipt with the unique service request number.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B68548 Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity

WS4.8.15	The solution provides the ability to notify a citizen upon a change of status of a service request such as completion of the request via the public website.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B68548 Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity
WS4.8.16	The solution provides the ability for a citizen to attach a document or image to the service request.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.17	The solution provides the ability to allow a citizen to opt-in or opt-out of email, surveys, script and/or notifications.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.18	The solution provides the ability for a citizen to print the service request via PDF that can be time and date stamped.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.19	The solution provides the ability to display an unlimited number of links within the website (i.e., on the page you could have a list of links to other websites).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

WS4.8.20	The solution provides the ability to auto-suggest service request content based on the type of request being created.	Policy Automation	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.21	The solution provides the ability for a citizen to submit and update personal contact information in a citizen profile, which would be validated by the City's database.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.22	The solution provides the ability for a citizen to select a preferred communications channel.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly
WS4.8.23	The solution provides the ability to send email (citizen preferred method) confirmations of any changes citizens made to their citizen profile.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly

WS4.8.24	The solution provides the ability for on-line service requests to generate error messages indicating the missing information if all required information is not entered.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.25	The solution provides the ability to automatically send a citizen satisfaction survey based on request type within a user-defined time frame.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B68548 Oracle RightNow Emails Sent Monthly – 100 emails sent – Monthly Capacity
WS4.8.26	The solution shall ensure that the City of Jacksonville name and logo can be branded on the application.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
WS4.8.27	The solution provides the ability to tailor the web entry forms for the public. The City will determine which transactions are available for public web reporting.	Policy Automation	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

WS4.8.28	The solution provides the ability to simplify citizen entry through the use of intelligent defaults, drop-downs, and similar techniques.	Policy Automation	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.29	The solution provides the ability to schedule, reschedule and cancel features on the web portal.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
WS4.8.30	The solution provides the ability for the citizen to save, resume and make changes to the system before submitting.	Policy Automation	B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
	Social Media Requirements		
SM4.9.1	The solution provides the ability to monitor the public Facebook feed.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages

SM4.9.2	The solution provides the ability to monitor Facebook posts made on the City's own page through the CRM application.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.3	The solution provides the ability to monitor specific handle mentions on Twitter.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.4	The solution provides the ability to monitor specific #hashtag mentions on Twitter.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages

SM4.9.5	The solution provides the ability to monitor specific keyword mentions on Twitter.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.6	The solution provides the ability to monitor blog posts through the CRM application.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.7	The solution provides the ability to respond to Facebook posts through the CRM application.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.8	The solution provides the ability to respond to Twitter posts through the CRM application.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.9	The solution provides the ability to respond to posts with rich media such as photos on Twitter.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.10	The solution provides the ability to respond to posts with rich media such as photos or audio clips on Facebook.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.11	The solution provides the ability to establish role permissions in preparation for assigning posts and workflows within the selected social media method.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.12	The solution provides the ability to review and approve outgoing, social media posts.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages

SM4.9.13	The solution provides the ability to algorithmically route posts to the appropriate workgroup.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.14	The solution provides the ability to manually route posts to the appropriate workgroup.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.15	The solution provides the ability algorithmically prioritize posts based upon citizen or request type.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.16	The solution provides the ability to manually prioritize posts based upon citizen or request knowledge.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.17	The solution provides the ability to create, open and close social media interactions as cases.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.18	The solution provides the ability to leave internally facing comments on cases.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.19	The solution provides the ability to develop, store, and send customizable template responses to frequently asked questions.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.20	The solution provides the ability to access the City's knowledge base from within the social media application.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages

SM4.9.21	The solution provides the ability to subscribe or unsubscribe to the City's knowledge base listings based on their interests and preferred social media selection.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.22	The solution provides the ability to publish a public events calendar directly based on the City's scheduled events.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.23	The solution provides the ability to publish events based on (e.g., date, location, topic/category, etc.).		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.24	The solution provides the ability to engage with subscribers based on interests (e.g., online forum, polls, and recorded comments from the public).		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.25	The solution provides the ability to push events or information on social media, web or blog sites.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.26	The solution provides the ability for service inquiries via e-mail, SMS, Facebook and Twitter.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.27	The solution provides simple navigation and online help tools.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.28	The solution provides calendar features that allow customers to track the latest group and community events.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages

SM4.9.29	The solution allows groups to establish membership directories and share information that will only be accessible by group members.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.30	The solution provides the ability to enter service requests via social media tools.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
SM4.9.31	The solution shall adhere to the City's social media policy.		B88386 Oracle Social Cloud, Basic – Production Environment B88389 Oracle Social Cloud, Basic – Message Data – 1,000 Messages
	Interactive Voice Response (IVR) Requirements		
IVR4.10.1	The solution provides Interactive Voice Response (IVR) on a 365 day/24 hour basis.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.2	The solution provides the ability to integrate with Automatic Call Distribution (ACD).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.3	The solution provides the ability to create call flows that provide additional prerecorded information.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.4	The solution provides a call flow that allows callers to get the information they need using the fewest number of prompts and options.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.5	The solution provides multi-language translation services including, but not limited to, English and Spanish.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.6	The solution provides features for professional voice recording of scripts to include, but not limited to, English and Spanish.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.7	The solution provides the ability to play appropriate language prompts based on IVR prompt selection.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.8	The solution provides the option to transfer a citizen from the IVR to the appropriate CSR, department and other identified entities outside the Service Center or allow the caller to return to the main menu.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.9	The solution provides the ability to place outbound calls, send a robot and SMS to citizens regarding case events and/or obligations (e.g., appointments, etc.).	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.10	The solution provides the ability to support self-service options, including directions, hours of operation, application instructions and case entry, status updates and make payments based on business rules.	Knowledge Management	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.11	The solution provides the ability to create automated customer satisfaction surveys. The survey shall be sent via phone, SMS (short message service), or email and shall be accessible via web or phone.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.12	The solution provides the ability to optionally allow setting up and conducting adhoc surveys of callers. Callers taking the survey will respond to spoken questions by pressing keys on their touch-tone phone or talking. Responses should be stored automatically in a server database.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.13	The solution shall have the ability to speak information obtained from the CRM, based on business rules (e.g., service request status, relevant dates (garbage dates) and other relate information).		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.14	The solution provides the ability for citizens to check on existing service requests and retrieve answers to routine questions.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.15	The solution provides the ability to schedule appointments with a confirmation in the callers requested method, based on business rules.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.16	The solution provides the ability for citizens to select the option to create a service request, based on business rules.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.17	The solution provides the ability to report analytics on call volume by request type, complexity, completed by CSR, completed by IVR system, success rates and other ad-hoc requests.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.18	The solution provides customizable IVR reporting.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.19	The solution provides a user friendly interface with limited complexity of the citizen options to ensure bypassing the system is kept to a minimum.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.20	The solution provides the ability to make real time changes to the call flow and recordings, based on business rules (e.g., bridge closures, hurricanes, etc.).	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.21	The solution provides SMS functionality as an option for the caller.	Cross-Channel Contact Center	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.22	The solution provides customizable messages or music to play while customers are on hold. Note: The customize message may be specific to the selection by the Citizen.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.23	The solution shall be ADA compliant.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.24	The solution provides status tracking capability to monitor and determine Citizen traffic within the IVR and at what stage the Citizen inquiry is being processed at any given point.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.25	The solution provides key ahead, prompting to permit callers to enter the appropriate key if they already know the touch tone options they wish to select or go directly to a CSR.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.26	The solution provides speech recognition (speech-to-text and text-to- speech) technologies to enhance efficiency and Customer service. The features and services should be in line with widely used standards like VoiceXML, SSML and CCXML, etc.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.27	The solution provides a queuing system that is integrated with the ACD functionality.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.28	The solution system must support Native SIP (Session Initiation Protocol).		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.29	The solution provides the option to opt out of hearing any messages while waiting to speak with a representative.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	Interactive Voice Response (IVR) Requirements - Optional		
IVR4.10.30	The solution provides the ability for the caller to shift the communication channel from IVR to texting.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.31	The solution provides the ability to blend the IVR with the web, mobile or chat while keeping context throughout the journey.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.32	The solution provides the ability to recall caller information about the last activity through the IVR.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.33	The solution provides the caller the ability to describe their problem in their own words via automated speech recognition (ASR).		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.34	The solution has the capability to play different announcements while customers wait that will NOT repeat during long wait times.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
IVR4.10.35	The solution provides virtual queuing – allows customers to receive a call back instead of waiting in a queue. The solution holds the caller's spot in queue until agent becomes available.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service

IVR4.10.36	The solution provides a predictive dialer.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service
	ePayments Requirements		
EPAY4.11.1	The solution must provide the ability to except payment from citizens via credit cards, echeck and debit.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.2	The solution must perform all calculations for applicable fees based on business rules.	Policy Automation	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
EPAY4.11.3	The solution must provide calculated payments and other required data elements to the Payment Management Service provider (currently Official Payments) via an open API.	Policy Automation	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.4	The solution must receive post back payment information from the Payment Management Service provider (currently Official Payments) via an open API and update the balance of the amount due.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.5	The system must provide real-time post-back information received from the Payment Management Service provider (currently Official Payments) to the Bookkeeping System (via the Tax Collector's web service) or other specified repository.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
EPAY4.11.6	The system must comply with the interface data element requirements for interface to the Bookkeeping System or the specified repository.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.7	All monies collected through the online payments process must be deposited into the Tax Collector's bank account.		B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
EPAY4.11.8	The system must provide the ability to print a receipt.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.9	The system must provide the ability to complete payment adjustments. (Note: Allows resolution of reconciliation issues.)	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.10	The system must maintain an audit trail of any payment adjustments completed.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.11	The system must provide a payment transaction report.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

EPAY4.11.12	The system must provide the ability to receive partial payments.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly
EPAY4.11.13	The system must provide the ability to print receipts.	Web Customer Service	B88488 Oracle RightNow Enterprise Contact Center Dynamic Agent Desktop Cloud Service B82255 Oracle RightNow Non-Contact Center User Cloud Service B72236 Oracle RightNow Universal Core Service Tier 1 Sessions Monthly B72233 Oracle RightNow Universal Policy Automation Tier 3 Sessions Monthly

Appendix 6 Oracle Customer Service and Support Cloud Services Descriptions and Metrics

The following described the Oracle Customer Service and Support Cloud Services descriptions and metrics as published by Oracle on March 15th 2018.

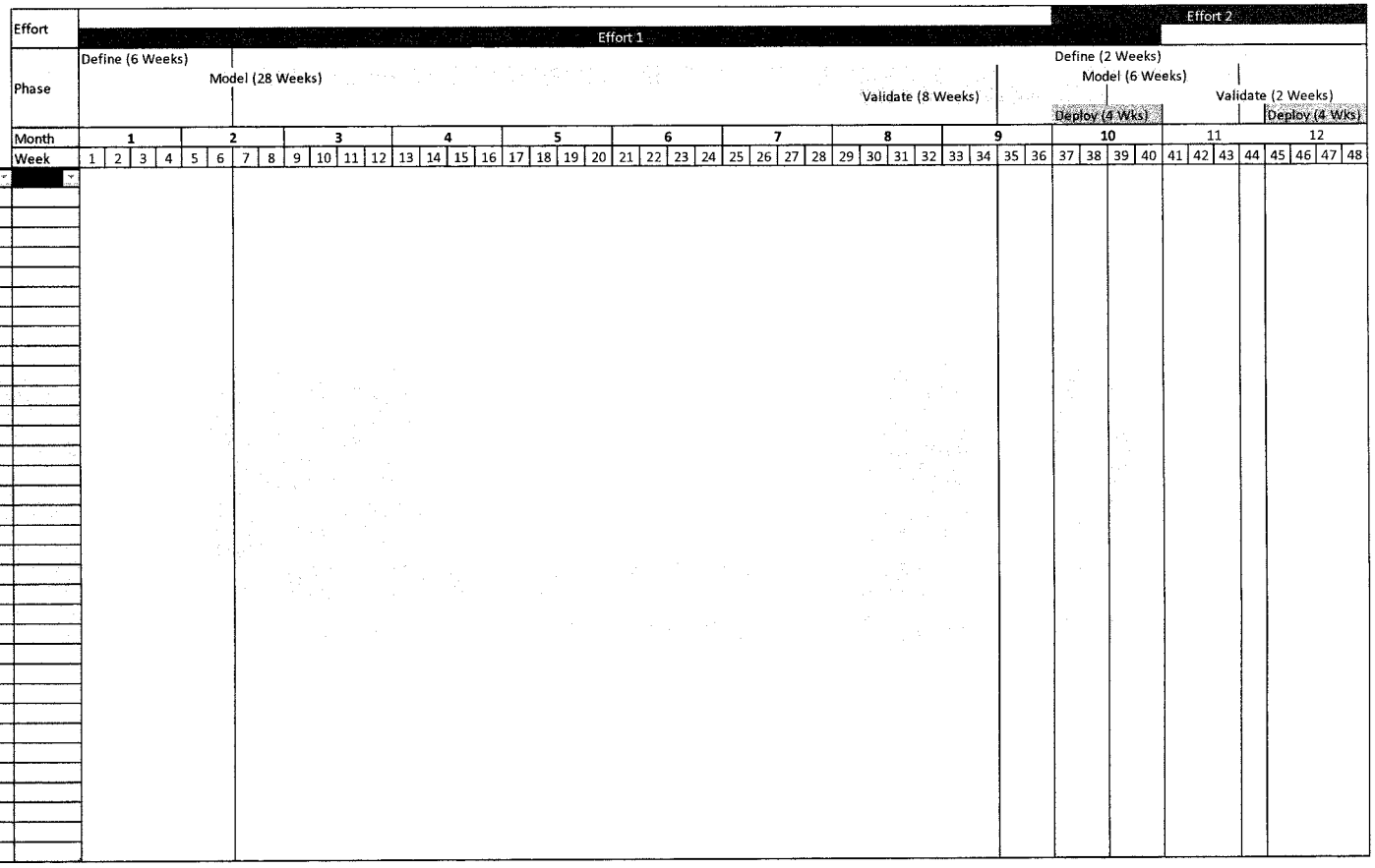
Appendix 7 Oracle Social Cloud – Metrics and Service Descriptions

The following described the Oracle Social Cloud metrics and service description as published by Oracle on February 7th 2018.

Appendix 8 Jacksonville City High Level Responsibilities by Project Phase v3

The following described City's high-level responsibilities by project phase.

Task	Participation
Project Kickoff	High
Prepare Workspace	High
City Project Staffing and SME identification	High
Attend Overview workshops	Medium
Review Functional Documentation Development	Low
Review Technical Documentation Development	Low
Project Plan Development	High
City Dept Business Process Documentation	High
CARE Functionality Mapping by Dept	High
Functional Configuration (Accounts, etc.)	Low
Customer Portal Implementation	Low
Policy Automation Configuration	Low
Workspace Configuraiton	Low
Workflow Configuration	Low
Business Rules Configuration	Low
Analytics Report Configuration	Low
Field Service Implementation / Configuration	Low
Social Monitoring Configuration	Low
SSO Configuration	Low
CARE Data ETL and Migration	Medium
Telephony Integration	Medium
SMS Integration	Low
City Systems Integrations	High
Change Management	High
UAT Script Development	High
UAT Testing	High
Data Validation	Medium
Integration Testing	Medium
City Employee Training	High
Develop and Monitor Production Cutover Plan	High
Make Go-No Go Decision	High
Production Cutover Activities	Low
Help Desk Strategy	Low
Post Production Project Activities	Low



Participation Estimates during blocked times
Low = < 25%
Medium = 25% - 75%
High = > 75%

CRM – Oracle CX and Cisco UCCX Functionality

1 **Web**: Web site for the public to report issues. Designed, configured and installed at Launch. **Dependency**: Web design, Policy Automation, Knowledge Mgt
AT LAUNCH

2 **Mobile:** Mobile app for iOS and Android for the public to report issues. Designed, configured and installed at Launch. **Dependency**: Mobile design, Policy Automation, Knowledge Mgt
AT LAUNCH

3 **Email:** Email option on Web and Mobile for the public to report issues. Intelligent subject design. Designed, configured and installed at Launch. **Dependency**: Knowledge Mgt
AT LAUNCH

4 **(UPGRADE) Cisco UCCX (IVR):** Phone calls for the public to report issues to agents. Designed, configured and installed prior to or at Oracle CX launch. **Dependency**: Cisco UCCX **AT LAUNCH**

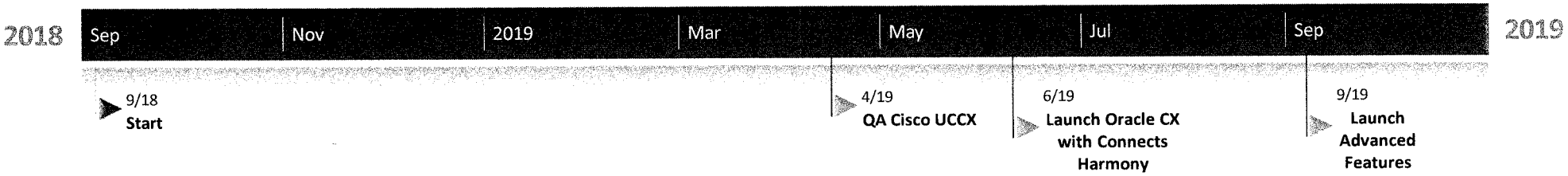
5 **(NEW) Connects Harmony:** Integrates Cisco UCCX with Oracle CX for integrating phone calls into other communication channels. **Dependency**: Cisco UCCX/Connects Harmony/CTI for Oracle CX
AT LAUNCH

7 **(NEW) Knowledge Management:** Ability to provide intuitive, suggested solutions to issues to both agents and public
Dependency: Policy Automation, Knowledge Mgt
AT LAUNCH

6 **(NEW) Chat:** Chat ability for agents to interact with the public to answer questions and/or open tickets. Designed, configured and installed at Launch. **Dependency**: Web design, Policy Automation, Knowledge Mgt
AT LAUNCH

8 **(NEW) Text:** Text ability for agents to interact with the public to answer questions and/or open tickets. **Dependency**: Acquire a text vendor for integration – delivery TBD; Policy Automation, Knowledge Mgt
ADVANCED FEATURE

9 **(NEW) Social – Facebook/Twitter **:** Ability to interact with the public via Twitter both to review comments, respond to inquiries and create tickets as needed. **Dependency**: Facebook/Twitter page, Policy Automation, Knowledge Mgt
ADVANCED FEATURES



** Facebook and Twitter require additional discussions and implementation with Public Affairs

CRM – Oracle CX and Cisco UCCX Functionality

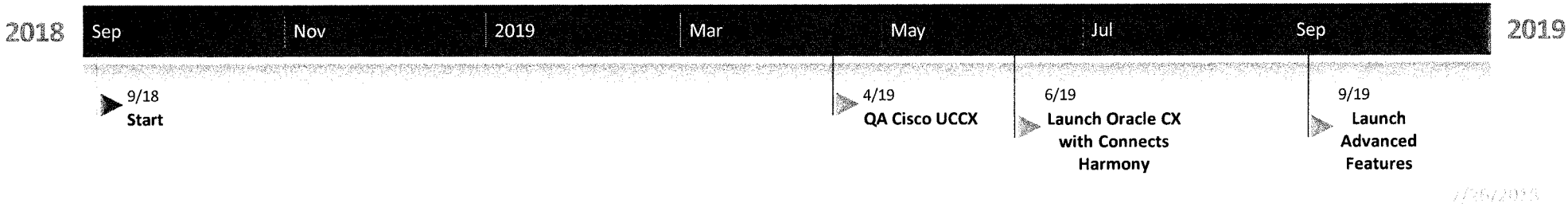
Knowledge Management: Knowledge management is not static and will continuously change. Requires regular review to find errors, make corrections and if necessary add content.
ONGOING

Payment/PRRs: If we make all of the City data available to the public via web site, there would be no need for Payment. The City of Chicago has employed this strategy making their City data available online for anyone to access **Dependency**: Online Payment vendor (Official Payments)
DISCUSSION

ChatBot: Oracle CX is capable – requires additional services, development (coding) and configuration. This feature also requires mature processes and a fully expanded knowledge management module. Oracle has recommend this as a later phase. **Dependency**: Oracle ChatBot/Automation services
OUT OF SCOPE

NOTES:
1. All timelines are estimates and not final
2. Dependencies will determine the delivery of the functions

NEXT STEPS:
1. Single source approval from GGAC – Target 08/02
2. Finalize SOW and contract with AST – Target 08/17
3. COJ and AST contract signatures – Target 08/24
4. Complete 630-CITY call center upgrade UCCX RFP – Target 08/17



Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
	Interactive Voice Response (IVR) Requirements					
IVR4.10.1	The solution provides Interactive Voice Response (IVR) on a 365 day/24 hour basis.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.	Based on the number of ERP - Oracle CRM integrations AST has provided within their customer base; Please provide information on AST's experience with Cisco UCCX telephony integration ? Please note that currently COJ - ITD is managing 10.6 UCCX (Version PREMIUM) with possible plans to upgrade to 11.5. Please be descriptive, we are interested in understanding if there are any issues with any of these UCCX versions (Premium versions; 10.5 or 11.5), and what list of "critical configuration points or pain points" has AST experienced while integrating with UCCX ?	AST has not directly integrated UCCX 10.6, but has integrated other versions with Oracle Service Cloud. We also have experience implementing other telephony vendor's CTI solutions, and the experience is mostly the same across the CTI realm, since CRM integration from CTI sources typically follows industry standard screen-pop implementation practices, which UCCX 10.6 does. It is possible to see other organizations implementing this type of solution through internet searches on the subject, i.e. "Cisco UCCX 10.6 to Oracle Service Cloud". The "connectors" or solutions that are presented on the Cisco forums follow the same implementation methodologies for implementing nearly all CTI solutions into Service Cloud (and other CRM tools). In the case of your implementation, we would leverage our experience integrating with various CTI solutions, such as UCCX and Twilio, which draw upon the same implementation paradigms required for version 10.6.	X
IVR4.10.2	The solution provides the ability to integrate with Automatic Call Distribution (ACD).	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.	Will ITD need to provide the connectors ? For example "Connects Harmony" ? Does AST have experience connecting the Oracle CRM to an UCCX ?	AST will either implement a derivative of an existing AST connector, or develop a new one, based on the circumstances of integration with the UCCX platform. The City has choice for implementing CTI integration based on requirements and cost. Based on discussion with the City, advanced features, such as a single agent UI with no swivel seating between UCCX and OSvC, AST can include configuration enhancement to enable such features as part of implementation estimate, or work with a vendor, such as B&S for Harmony, to implement a preferred CTI solution.	X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.3	The solution provides the ability to create call flows that provide additional prerecorded information.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
IVR4.10.4	The solution provides a call flow that allows callers to get the information they need using the fewest number of prompts and options.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
IVR4.10.5	The solution provides multi-language translation services including, but not limited to, English and Spanish.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation. Agent interaction in Service Cloud can be defined by languages and calls may be routed to language-specific agents through the IVR.			X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.6	The solution provides features for professional voice recording of scripts to include, but not limited to, English and Spanish.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation. Agent interaction in Service Cloud can be defined by languages and calls may be routed to language-specific agents through the IVR.			X
IVR4.10.7	The solution provides the ability to play appropriate language prompts based on IVR prompt selection.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation. Agent interaction in Service Cloud can be defined by languages and calls may be routed to language-specific agents through the IVR.			X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.8	The solution provides the option to transfer a citizen from the IVR to the appropriate CSR, department and other identified entities outside the Service Center or allow the caller to return to the main menu.	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation. Agent interaction in Service Cloud can be defined by languages and calls may be routed to language-specific agents through the IVR.			X
IVR4.10.9	The solution provides the ability to place outbound calls, send a robot and SMS to citizens regarding case events and/or obligations (e.g., appointments, etc.).	Web Customer Service	Outbound calling from Service Cloud will be configured as part of the integration with UCCX. SMS will be provided through implementation by AST using accelerators to send and receive SMS through Twilio.	ITD: AST will provide this (based on our understanding of their response). Will AST confirm they will implement SMS and Robot ? Would this be a component or add-on that would need to be added to the product list ? Is the AST accelerator the same as the AST Cloud Connect? Is Twilio AST's preferred provider for SMS?	The SMS accelerator would be included as part of AST's implementation cost, not a product cost from Oracle. This specific requirement necessitates implementation from a Systems Implementor, like AST. AST has implemented this type of solution before, which allows us to leverage pre-built components to enable this enhacement to Service Cloud for the City. AST's accelerator allows rapid implementation as this is a common request from cities. This is not the same ast the AST Cloud Connect solution as part of the ERP solution. The accelerator is specific to AST's 311 solution for Oracle Service Cloud. Twilio is AST's preferred SMS vendor, but the SMS provider marketplace is flexible and it is possible to leverage other vendors with our accelerators should the City request that option. AST requests further clarification around the "Robot" term, as it may have different meanings depending on the context. Do you mean an auto-response mechanism via SMS?	X
IVR4.10.10	The solution provides the ability to support self-service options, including directions, hours of operation, application instructions and case entry, status updates and make payments based on business rules.	Knowledge Management				X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.11	The solution provides the ability to create automated customer satisfaction surveys. The survey shall be sent via phone, SMS (short message service), or email and shall be accessible via web or phone.	Web Customer Service	Surveys are sent via email. SMS-based feedback can be implemented through AST SMS solution configuration. Voice-based surveys are not part of the scoped effort, and are typically a component of the IVR system, but AST can provide solution options if voice surveys are a high-priority requirement.	ITD: AST will provide this (based on our understanding of their response) Would this be a component or add-on that would need to be added to the product list ? What "Scope" are you referencing in determining "not currently scoped in this effort"?	Email-based surveys are included out-of-the box and can be configured as needed. SMS-based feedback is a configuration to the Service Cloud platform. Feedback via SMS can be included as part of implementation services when AST delivers SMS functionality. This would not be an addition to the product list provided by Oracle, though SMS use would incur cost through the SMS vendor (Twilio, etc.) used. Referencing a scope was not the correct use of terms. Rather, AST would propose that we work with the City to determine if SMS-based feedback / surveys would be needed in the implementation scope since it is not a standard product feature.	X
IVR4.10.12	The solution provides the ability to optionally allow setting up and conducting adhoc surveys of callers. Callers taking the survey will respond to spoken questions by pressing keys on their touch-tone phone or talking. Responses should be stored automatically in a server database.		Automated (bots) voice-based surveys are not part of the scoped effort, and are typically a component of the IVR system, but AST can provide solution options if voice surveys are a high-priority requirement. This typically implies a shift to a compatible voice / telephony provider. Human-driven surveys may be configured as part of the solution.	ITD: AST will provide this (based on our understanding of their response) Would this be a component or add-on that would need to be added to the product list ? Please expand on what is meant by: "This typically implies a shift to a compatible voice / telephony provider". We currently work in UCCX (Premium version) and using AT&T PRI's. Is this considered a compatible provider ? What "Scope" are you referencing in determining "not currently scoped in this effort"?	Email-based surveys are included out-of-the box and can be configured as needed. Bots and voice-based surveys are not included as part of the Service Cloud product out-of-the-box. Referencing a scope was not the correct use of terms. Rather, AST would propose that we work with the City to determine if voice-based feedback / surveys would be needed in the implementation scope since it is not a standard product feature. Voice-based surveys would require a supported telephony product that can provide the survey; this is not a feature typically implemented as part of the CRM. Cisco UCCX can provide post-call surveys. And, that data could be integrated into Oracle Service Cloud for visibility alongside email or other surveys. But, the functionality and data collection components are part of the telephony system.	X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.13	The solution shall have the ability to speak information obtained from the CRM, based on business rules (e.g., service request status, relevant dates (garbage dates) and other relate information).		Automated (bots) voice responses are not part of the scoped effort, and are typically a component of the IVR system, but AST can provide solution options if voice surveys are a high-priority requirement. This typically implies a shift to a compatible voice / telephony provider. Human-driven responses may be provided by agents through contextual information presented within the application.	ITD: AST will provide this (based on our understanding of their response) Please expand on what is meant by: "This typically implies a shift to a compatible voice / telephony provider". We currently work in UCCX (Premium version) and using AT&T PRI's. Is this considered a compatible provider ?	Voice-bots via the telephony service are not a standard part of Service Cloud and have not been proposed as part of the 311 solution through Service Cloud. Like the previous response with surveys, this capability is typically implemented at the CTI solution rather than the CRM. UCCX 10.6, based on our research, does not support this feature. However, should the City implement a CTI solution that does provide CTI-based voice bots, then that solution can integrate with Oracle Service Cloud's knowledgebase and incident / service request intake to provide automated intellegent responses. It does appear that UCCX 10.6 can be integrated for non AI-driven tasks, such as indicating if a user has an open request during the inbound call process. That ability is mostly dependent on the CTI solution and it's ability to leverage web services to collect data and change the IVR decision tree. AST can work with the City's ITD team (or responsible team for the telephony solution) to allow this if technically possible based on the City's UCCX implementation/configuration.	X
IVR4.10.14	The solution provides the ability for citizens to check on existing service requests and retrieve answers to routine questions.		Service request status by automated (bots) voice is not part of the scoped effort, and are typically a component of the IVR system, but AST can provide solution options if voice surveys are a high-priority requirement. This typically implies a shift to a compatible voice / telephony provider. Human-provided responses based on information in the service system is a core component of the application	ITD: AST will provide this (based on our understanding of their response) Would this be a component or add-on that would need to be added to the product list ? Please expand on what is meant by: "This typically implies a shift to a compatible voice / telephony provider". We currently work in UCCX (Premium version) and using AT&T PRI's. Is this considered a compatible provider ? What "Scope" are you referencing in determining "not currently scoped in this effort"?	The ability to check existing service requests via web portals is standard and out-of-the-box. Telephony implementation of that function is not included out of the box and has not currently been proposed as a deliverable for the 311 implementation. It does appear that UCCX 10.6 can be integrated for non AI-driven tasks, such as indicating if a user has an open request during the inbound call process. That ability is mostly dependent on the CTI solution and it's ability to leverage web services to collect data and change the IVR decision tree. AST can work with the City's ITD team (or responsible team for the telephony solution) to allow this if technically possible based on the City's UCCX implementation/configuration.	X
IVR4.10.15	The solution provides the ability to schedule appointments with a confirmation in the callers requested method, based on business rules.	Cross-Channel Contact Center	From an IVR / Telephony solution, this would require integration with support from the IVR for an automated process (no City agent involvement). An agent-driven scheduling process can be configured.			X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.16	The solution provides the ability for citizens to select the option to create a service request, based on business rules.	Web Customer Service	From an IVR / Telephony solution, this would require integration with support from the IVR for an automated process (no City agent involvement). An agent-driven scheduling process can be configured. Web and mobile self service options are included as per the self-service responses in previous sections.			X
IVR4.10.17	The solution provides the ability to report analytics on call volume by request type, complexity, completed by CSR, completed by IVR system, success rates and other ad-hoc requests.	Cross-Channel Contact Center	If a call is converted into an interaction for service, such as popping a record for an agent to view in Service Cloud, then those metrics are captured and reported in Service Cloud. Full call records for all call data are typically managed by the IVR solution. If supported by the IVR, Service Cloud Analytics can be integrated to show all data data exposed by the IVR from within Service Cloud. This integration is not currently scoped as part of this effort.	Is the Service Cloud Analytic a separate module and is it this the same as Oracle Analytics and Data Visualization projected to be used in ERP solution? Would this be included in the product list? What "Scope" are you referencing in determining "not currently scoped in this effort"?	Oracle Service Cloud provides analytics tools with Cross-Channel Contact center. That feature provides analytics into Service Cloud-specific data, and can be extended to provide visibility into external data. It is different than the analytics solution proposed as part of the ERP effort. Referencing a scope was not the correct use of terms. Rather, AST would work with the city to determine if data that is collected via the CTI system is required as part of the overall solution. Metrics that are built into the nature of telephony-channel based incident management (such as the fact that a call came in, an agent created and incident, and then any metrics applied to that incident from creation to resolution) are captured as part of native service cloud functionalty. But, data that remains in the telephony system, such as call recording, call time, etc. typically remains in the CTI system unless an integration between CTI (UCCX in this case) and Service Cloud is build to move that data. As a best practice, we typically suggest keeping the data in the separate systems. However, we can work with the City to determine the best process for your needs.	X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.18	The solution provides customizable IVR reporting.		If supported by the IVR, Service Cloud Analytics can be integrated to show all data data exposed by the IVR from within Service Cloud. This integration is not currently scoped as part of this effort.	Is the Service Cloud Analytic a separate module? Would this be included in the product list? What "Scope" are you referencing in determining "not currently scoped in this effort"?	Oracle Service Cloud provides analytics tools with Cross-Channel Contact center. That feature provides analytics into Service Cloud-specific data, and can be extended to provide visibility into external data. It is different than the analytics solution proposed as part of the ERP effort. Referencing a scope was not the correct use of terms. Rather, AST would work with the city to determine if data that is collected via the CTI system is required as part of the overall solution. Metrics that are built into the nature of telephony-channel based incident management (such as the fact that a call came in, an agent created and incident, and then any metrics applied to that incident from creation to resolution) are captured as part of native service cloud functionalty. But, data that remains in the telephony system, such as call recording, call time, etc. typically remains in the CTI system unless an integration between CTI (UCCX in this case) and Service Cloud is build to move that data. As a best practice, we typically suggest keeping the data in the separate systems. However, we can work with the City to determine the best process for your needs.	X
IVR4.10.19	The solution provides a user friendly interface with limited complexity of the citizen options to ensure bypassing the system is kept to a minimum.	Cross-Channel Contact Center	The solution UI is not typically something that a caller would see (unless coming from web or mobile channels to a phone call). For visual channels, the UI will be implemented as per guidelines established during project kickoff. The IVR "UI" would be managed by the IVR system.			X
IVR4.10.20	The solution provides the ability to make real time changes to the call flow and recordings, based on business rules (e.g., bridge closures, hurricanes, etc.).	Cross-Channel Contact Center	IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.21	The solution provides SMS functionality as an option for the caller.	Cross-Channel Contact Center	SMS functionality will be implemented as part of the proposed solution and will be made available to citizens. Notifying IVR users of the capability to SMS a request may require an update to messages provided to collers through UCCX; that update would be the responsibility of the City's IVR management team.	ITD: AST will provide this (based on our understanding of their response) Would this be a component or add-on that would need to be added to the product list ?	AST has not proposed SMS hand-off from telephony as part of this solution, though it is technically possible to implement and AST would work with the City to deliver such a feature. The "offer SMS" via telephone function is a process managed in the CTI (UCCX in this case) tool. AST's consultants have implemented this handoff feature as part of Twilio's IVR functions, so the concept is possible. But, it would likely require effort from the ITD team to configure UCCX to offer SMS and then perform an API call if the user selects that option.	X
IVR4.10.22	The solution provides customizable messages or music to play while customers are on hold. Note: The customize message may be specific to the selection by the Citizen.		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
IVR4.10.23	The solution shall be ADA compliant.		The integration of UCCX and Oracle Service Cloud should not have any implication regarding ADA compliance. UCCX would be responsible for telephony / IVR compliance.			X
IVR4.10.24	The solution provides status tracking capability to monitor and determine Citizen traffic within the IVR and at what stage the Citizen inquiry is being processed at any given point.		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.25	The solution provides key ahead, prompting to permit callers to enter the appropriate key if they already know the touch tone options they wish to select or go directly to a CSR.		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
IVR4.10.26	The solution provides speech recognition (speech-to-text and text-to- speech) technologies to enhance efficiency and Customer service. The features and services should be in line with widely used standards like VoiceXML, SSML and CCXML, etc.		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
IVR4.10.27	The solution provides a queuing system that is integrated with the ACD functionality.		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation. Routing callers based on UCCX queing would be managed as part of the screen pop configuration effort.			X

	Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.					
						Can be met with Cisco's UCCX (Express) Version
IVR4.10.28	The solution system must support Native SIP (Session Initiation Protocol).		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
IVR4.10.29	The solution provides the option to opt out of hearing any messages while waiting to speak with a representative.		IVR & Telephony functionality would be provided through the City's UCCX 11.5 telephony system. AST will integrate Oracle Service Cloud into UCCX using screen pop to connect a caller to an agent at the end of flows defined in the IVR. IVR requirements are satisfied by the UCCX implementation.			X
	Interactive Voice Response (IVR) Requirements - Optional					
IVR4.10.30	The solution provides the ability for the caller to shift the communication channel from IVR to texting.		This functionality is possible in UCCX, but would be through implementation of a separate tool to enable that solution in UCCX, as opposed to Oracle Service Cloud.	What separate tool is being referenced ? Can you please provide an example based on the implementation experience by AST in this area ? Would this be a component or add-on that would need to be added to the product list ?	The "offer SMS" via telephone function is a process managed in the CTI (UCCX in this case) tool. AST's consultants have implemented this handoff feature as part of Twilio's IVR functions, so the concept is possible. But, it would likely require effort from the ITD team to configure UCCX to offer SMS and then perform an API call if the user selects that option. The API call would trigger an event to send the user an SMS message to proceed with their request via the SMS channel.	X

ITD	**Instructions:** For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.					
						Can be met with Cisco's UCCX (Express) Version
IVR4.10.31	The solution provides the ability to blend the IVR with the web, mobile or chat while keeping context throughout the journey.		The capability to integrate a modern IVR into web, mobile, and chat processes do exist. The IVR is the constraining variable for this request. UCCX would need to support such a solution, and it would require implementation not currently scoped in this effort, but may be added per the City's request.	Does AST have a solution that supports an OmniChannel blended configuration ? Would this be a component or add-on that would need to be added to the product list ? Based on AST's experience, have you integrated this requirement with other UCCX environments ? Have you encountered any concerns with UCCX and can you provide specific feedback to help us understand what version or UCCX change best supports this requirement ? What "Scope" are you referencing in determining "not currently scoped in this effort"? ADDITIONAL QUESTIONS SENT TO AST: 1. Is Oracle RightNow the older name brand (retired) and currently it is Oracle CX ? 2. Does the Oracle RightNow Enterprise Dynamic Agent Desktop Cloud Service – Hosted Named User support the implementation	Service Cloud provides an omni-channel experience, but there is typically a one-channel-per-interaction model. This means that a customer and agent could communicate via phone, web, email, SMS, etc., but each of those items would occur at separate times, such as a phone call followed by email, then followed by a text. A blended experience, where a caller might get an SMS while on a call to take action elsewhere is not typically a paradigm that we implement with service cloud, and it could cause confusion in most cases, except where an online chat and screen sharing may occur simultaneouly. AST recommends the omni channel approach, but would like to explorer the expectations around a simultaneous blended experience that appears to be the request in this question. ANSWERS TO THE ADDITIONAL QUESTIONS: 1) Yes, RightNow is the older brand name and has been retired. However, it does still appear in some of Oracle's documentation, as with the case in some of the ordering line items. 2) The license mentioned and the capability to integrate with third party systems are not coupled. Any of the Dynamic Agent Desktop licenses gives access to the "core" product. And, that can be integratedd to UCCX. 3) Yes, at Sacramento County, CA 4) Most integrations to not require 3rd party licenses to integrate, UCCX included. AST would recommend a "custom development package", similar to what was	
IVR4.10.32	The solution provides the ability to recall caller information about the last activity through the IVR.		Call recording would be provided through UCCX or another IVR provider. This is generally a supported feature in most IVRs. This functionality can be extended into Service Cloud, such as attaching voice recordings, transcribing conversations, etc. as long as the IVR / telephony provider supports it. That integration is not currently scoped in this effort, but can be added per the City's request..	ITD: AST will provide this (based on our understanding of their response). Would this be a component or add-on that would need to be added to the product list ? What "Scope" are you referencing in determining "not currently scoped in this effort"?	Call recording would not be implemented as part of the Service Cloud implementation. Rather, they City can enable call recording via UCCX, and the call recording may be attached to a service request via an integration between UCCX and Service Cloud. But, the call recording feature is a component of the telephony system.	X

Instructions: For each requirement, please select the Module in column C that meets the requirement. The notes column may be used to provide any additional, pertinent information, and/or optional module required to meet the requirement.

						Can be met with Cisco's UCCX (Express) Version
IVR4.10.33	The solution provides the caller the ability to describe their problem in their own words via automated speech recognition (ASR).		This requirements is typically managed by the IVR tool, and would be a requirement for UCCX. There are IVR solutions in the market that provide this capability, and they can be integrated into service cloud to automate the IVR process, provide intelligence to automated questions, or to serve knowledgebase content through voice-enabled services. That integration is not currently scoped in this effort, but can be added per the City's request.	"That integration is not currently scoped in this effort, but can be added per the City's request." please clarify. What "**Scope**" are you referencing in determining "not currently scoped in this effort"? Does AST have experience with your below stated quote ("There are IVR solutions in the market that provide this capability, and they can be integrated into service cloud to automate the IVR process, provide intelligence to automated questions, or to serve knowledgebase content through voice-enabled services."). Can you provide an IVR vendor recommendations?	The mentioned scope was not the correct term for AST to use. Rather, this type of feature is not a part of Service Cloud directly. Like the other voice-based requirements in this section, the majority of the functionality is typically implemented outside of the 311 solution, and in the CTI or telephony system. Automated speach reconition that is implemented in the CTI system can be integrated into Oracle Service Cloud, but that is based on UCCX's ability to implement the ASR function, and then provide any needed integration or data set based on the information called by the CTI tool to pass information to Service Cloud. AST would work with the City to find the telephony solution to provide ASR functionality through UCCX.	X
IVR4.10.34	The solution has the capability to play different announcements while customers wait that will NOT repeat during long wait times.		This requirement would be managed by the City's IVR tool.			X
IVR4.10.35	The solution provides virtual queuing – allows customers to receive a call back instead of waiting in a queue. The solution holds the caller's spot in queue until agent becomes available.		This requirement would be managed by the City's IVR tool.			X
IVR4.10.36	The solution provides a predictive dialer.		Dialing extensions can be built into the Service Cloud UI to provide predictive dialing. This has been scoped into the effort, assuming that UCCX supports the capability for outbound dialing integration in the City's implementation without further configuration, tools, licenses, or other cost. Should any of those restrictions be discovered, then the City can choose to enable them and allow for the implementation, or not implement a predictive dialer from within Service Cloud.			X

QWS3270X 8/10/2018 11:12 AM
FAML6350 V5.1 ** NW COJ FAMIS PRODUCTION ** 08/10/2018
LINK TO: ACCOUNT SUMMARY INQUIRY 11:12 AM

FISCAL MO/YEAR : 11 2018 CURRENCY CODE :
INDEX CODE : AFIT53A ITD SYSTEM DEVELOPMENT
SUBOBJECT : 069509 DM-CAPITAL PROFESSIONAL SERVICES
PROJECT : ITES01 CARE SYSTEM / CALL CENTER
PROJECT DETAIL : 01 CARE REPLACEMENT
GRANT :
GRANT DETAIL :
USER CODE :

S	AUG 2018	ANNUAL BALANCE	ALL YEARS BALANCE
ESTIMATED REVENUES	.00	.00	.00
REVENUES	.00	.00	.00
UNREALIZED REVENUES	.00	.00	.00
BUDGET	.00	375,000.00	375,000.00
EXPENDITURES	.00	.00	.00
ENCUMBRANCES	.00	.00	.00
PRE-ENCUMBRANCES	.00	.00	.00
REMAINING BALANCE	.00	375,000.00	375,000.00

F1-HELP F2-SELECT F4-PRIOR F5-NEXT
F9-LINK F10-PRIOR-MO F11-NEXT-MO

G014 - RECORD FOUND