

# Response to Request for Proposal

February 14, 2025

**The City of Surprise, Arizona**

**HUMAN CAPITAL MANAGEMENT ENTERPRISE SYSTEM**

Project ID: 325213

Submitted by: **Inovium, LLC**

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**Alliance  
Partner**



**Schedule**

**Contract#: 47QTCA24D000H**

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## Attachment A – Proposal Forms

Proposal Tab No.	Proposal Section
<b>Tab 1</b>	Company Introduction and Relevant Experience
<b>Tab 2</b>	Software Solution
<b>Tab 3</b>	Project Approach and Implementation Methodology
<b>Tab 4</b>	Key Proposed Personnel and Team Organization
<b>Tab 5</b>	Project Schedule
<b>Tab 6</b>	System and Application Architecture
<b>Tab 7</b>	Data Conversion Plan
<b>Tab 8</b>	Security and Software Hosting
<b>Tab 9</b>	Testing and Quality Assurance Plan

Proposal Tab No.	Proposal Section
<b>Tab 10</b>	Training Plan
<b>Tab 11</b>	References
<b>Tab 12</b>	Sample Contracts, Warranty, and Escrow
<b>Tab 13</b>	Exceptions to Project Scope and Contract Terms
<b>Tab 14</b>	Please insert the response to Attachment B, Functional and Technical Requirements, following Attachment B in the electronic submittal of the consolidated PDF Technical Proposal.
<b>Supplements</b>	Any Proposer-submitted materials or documentation not specifically requested through this RFP may be included as Supplements to the Proposal in a separately marked "Supplements" tab of the proposal.

## Tab 1 – Company Introduction and Relevant Experience

**Table 1-01: Transmittal Certification and Primary Contact Information**

Field	Response
Name of the Proposer Representative	Tessa Thomas
Title	Customer Experience Manager
Name of Company	Inovium, LLC
Address	1005 Congress Ave Suite 925 Austin Texas 78701
Telephone Number	904-762-5445
Email Address	Tessa.thomas@inovium.com

**Mission-**At Inovium, we are committed to fostering a foundation of trust and empowerment for our customers and their employees. Through our expert guidance and the innovative, agile approach to implementing Infor's Workforce Management Suite (WFM), we aim to lead businesses through transformative digital journeys.

Our mission is to unlock the full potential of your workforce, enabling streamlined operations and enhanced productivity. We are dedicated to your success, ensuring that every digital transformation strategy we implement is designed to elevate your organization's efficiency and drive tangible outcomes.

**Purpose-**To empower organizations by transforming their workforce management through innovative solutions, agile continual improvement, and expert consulting. Our purpose is to enable businesses to harness the power of digital transformation, optimizing their human capital potential and fostering a culture of trust, efficiency, and growth. We are dedicated to delivering strategic insights and practical solutions that drive organizational success and employee satisfaction, leveraging the strength of Infor's Workforce Management System to achieve these goals.

**Historical Background-**Since July 2017, we have specialized in human capital management and workforce management implementations and support. We are relentlessly dedicated to revolutionizing the digital landscape for HR and the workforce.

Our team boasts an average of over a decade of experience in both software and domain expertise, ensuring that your projects thrive, and your outcomes exceed expectations.

**Financial Stability-** Inovium is pleased to extend an offer to provide financial documents upon request by City of Surprise. Inovium is rooted in fiscal prudence and has consistently demonstrated profitable growth since our inception in 2017. Our success is attributed to our solid reputation and an expanding portfolio of success stories, underlining our year-over-year progress and advancements. This financial stability and growth trajectory underscore our commitment to excellence and the trust placed in us by our clients and partnership with Infor which also continues to build year over year

**Experience and Proficiency-**Inovium's team represents one of the most experienced HR, HCM, and Workforce practices in the Infor partner ecosystem. Our team of highly experienced consultants typically have well over a decade of experience as Infor staff, customers, and/or consultants for the Infor solution set. Inovium is also a small business on the GSA schedule for Public Sector and Federal Work.

## 1.1 TRANSMITTAL LETTER

**February 13, 2025**

**City of Surprise Team**

**Subject:** Transmittal Letter for RFP Submission

Dear City of Surprise,

On behalf of Inovium, LLC, I am pleased to submit our proposal in response to the City of Surprise's Request for Proposal for Human Capital Management Enterprise System. As a leading provider of workforce management and timekeeping solutions, Inovium is committed to delivering innovative, efficient, and scalable solutions tailored to the City's needs.

### Proposer Information

Inovium, LLC is a limited liability company specializing in Human Capital Management solutions. Our company is registered and authorized to do business under applicable laws. If awarded, Inovium will be the primary entity responsible for project execution, with no joint proposers. Our proposal includes third-party technology from Infor's Human Capital Management to provide a comprehensive workforce solution.

### Software Solution and Partners

Our proposal showcases Infor HCM and WFM — an industry-leading workforce management solution designed to optimize timekeeping, scheduling, and compliance. Backed by FedRamp-certified security, your team can trust that critical data always remains protected.

### Acknowledgment of Addenda

We acknowledge that we have reviewed and incorporated all addenda issued as part of this RFP process.

We appreciate the opportunity to submit this proposal and look forward to the possibility of partnering with the City of Surprise. If you require additional information or have any questions, please do not hesitate to contact me.

Sincerely,

Tessa Thomas

**Customer Experience Manager**

**Inovium, LLC**

Mobile: +1 (904) 762-5445



## 1.2 COMPANY BACKGROUND AND HISTORY

- i. Proposer to provide a comprehensive history statement of the firm, including any mergers, assignments, or other corporate changes during the past 10 years.

**Response:** Inovium has been a leading innovator in workforce management and enterprise software solution implementations since our founding in 2017. Our company was founded with a mission to provide highly configurable, agile, and customer-focused solutions that drive operational excellence for organizations across industries.

Over the past 8 years, Inovium has experienced steady growth and continuous innovation, expanding its product offerings and customer base. While we have remained independently owned and operated, we have strategically evolved our solutions and service offerings to align with industry advancements and customer needs

There have been no mergers, acquisitions, or significant corporate restructuring events that have altered our commitment to providing best-in-class workforce management solutions. However, we have continuously enhanced our platform through investments in technology, strategic partnerships, and ongoing customer-driven development. Our ability to adapt and evolve without disruption underscores our long-term stability and reliability as a trusted solutions provider.

With a strong track record of innovation, customer-centric development, and seamless service delivery, Inovium remains committed to providing scalable, flexible, and future-ready solutions for our clients.

- ii. Proposer shall complete the Company Background and History Table as provided below.

If a partnership with third-party company is a part of the Proposal, the Company Background and History table shall be provided for each entity. It is expected that all points shall be addressed for each company involved in the Proposal, prime or third party. Proposer to copy the table as needed for each Partner/Third-Party Firm proposed and fill out for each.

**Table 1-02: Company Background and History (1)**

Metric	Response
Name of Proposer:	Inovium, LLC
(Copy form and Complete if applicable for each) Name of Partner/Third-Party Firm:	Infor, Inc.
Total number of employees	50
Type and number of employees committed to the product and support being proposed	40+



Metric	Response
Office locations (City and State)	Austin, Texas
Total number of active clients	Private: 27 Government: 8
Total number of active Private Sector HCM clients	27
Total number of active Government Sector HCM clients	8
Total years offering proposed software systems	7
Total number of Arizona Government clients with breakout by Municipality, County, Other	Municipality: NA County: NA Other: Some clients have AZ presence, including Spencer's and DirectTV,
Total number of completed implementations of the proposed product and version	35+ projects with various modules
Total number of active government clients using the proposed product version	8
Largest active government installation, including population	Division of Department of Energy 10,000+ Employees
Smallest active government installation, including population	Santa Clara Valley Water; 26,000
Other products offered by the company	Configuration as a Service Subscription

**Table 1-02: Company Background and History (2)**

Metric	Response
Name of Proposer:	Inovium, LLC
<i>(Copy form and Complete if applicable for each)</i> <b>Name of Partner/Third-Party Firm:</b>	Infor, Inc
Total number of employees	Infor has approximately 17,600+ employees worldwide.
Type and number of employees committed to the product and support being proposed	Infor has approximately 1,698 employees dedicated to support and 6,395 dedicated to development.
Office locations (City and State)	<p><b>Infor Worldwide Locations</b></p> <p>Infor is an international company with 100+ direct offices in 40+ countries. Our headquarters is located in New York, NY. United States offices are located in Centennial, Colorado; Alpharetta, Georgia; Chicago, Illinois; Wichita, Kansas; St Paul, Minnesota.</p> <p>Worldwide, Infor has offices in Australia, Argentina, Austria, Belgium, Brazil, Canada, Chile, China, Colombia, Czech Republic, Denmark, Egypt, Finland, France, Germany, Hong Kong, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Norway, Philippines, Poland, Portugal, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, United Arab Emirates, United Kingdom, and the United States.</p> <p>For a complete list please use the following link to view our Infor office locations.</p> <p><a href="https://www.infor.com/locations">https://www.infor.com/locations</a></p>
Total number of active clients	<p>Private: Over 68,000 customers.</p> <p>Government: Over 600 customers, including the majority of the top 20 municipalities in the USA.</p>
Total number of active Private Sector HCM clients	Over 1000 customers.
Total number of active Government Sector HCM clients	Over 30 customers.
Total years offering proposed software systems	Over 10 years. Infor is celebrating its 50 <sup>th</sup> anniversary in 2025.
Total number of Arizona Government clients with breakout by Municipality, County, Other	<p>Municipality: N/A</p> <p>County: Pima County</p> <p>Other: State of Arizona, Arizona Dept of Treasury</p>

Total number of completed implementations of the proposed product and version	Over 100.
Total number of active government clients using the proposed product version	For WFM, over 50. The distinction of being the sole FedRAMP authorized multi-tenant WFM solution available in the market, setting a gold standard for security and reliability. For HCM, over 50.
Largest active government installation, including population	State of Idaho, Population 2M+
Smallest active government installation, including population	Apex, North Carolina, is one of our smallest. 75K population.
Other products offered by the company	Analytics, ERP, Permitting, Full Financials, Utility Billing, Warehouse Mgt System, and more.

### 1.3 RELEVANT EXPERIENCE

- i. Please describe your relevant experience working with Arizona entities (Counties, Municipalities, etc.).

**Response:** While Inovium has not yet worked directly with Arizona state or local entities, we have extensive experience supporting public sector organizations in other regions. Our expertise in workforce management and operational solutions enables us to navigate the unique challenges of government agencies, including regulatory compliance and budget constraints.

We are confident our agile, customer-focused approach can deliver lasting value to Arizona entities and welcome the opportunity to establish a strong partnership.

- ii. Please describe any relevant experience working with similarly situated municipalities and/or special districts, including any unique factors that arise during the implementation process.

**Response:** Inovium has successfully implemented Infor Human Capital Management (HCM) & Workforce Management (WFM) for municipalities and special districts using an Agile methodology approach that ensures flexibility, stakeholder collaboration, and real-time adjustments.

Municipal implementations often involve unique labor agreements, legacy system integration, and multi-department coordination. Our phased rollouts, iterative feedback loops, and continuous configuration services minimize risk and ensure alignment with operational needs.

By breaking implementation into manageable sprints, we accelerate adoption, improve user proficiency, and optimize system performance. Our experience with similar public sector entities

demonstrates our ability to deliver scalable, efficient workforce management solutions tailored to government requirements.

- iii. Identify two recent project implementations that are most comparable to the City's proposed implementation, and provide a project profile for each, including: scope of modules; project duration; any unique requirements or circumstances that were a part of, or came up during, the project; the legacy system converted from; etc.

**Response:** Inovium is implementing Infor FSM, HCM, and WFM with a phased approach targeting a payroll go-live in January 2026. The project involves master data management, multiple integrations (Active Directory, ServiceNow, EDI 834), and a structured train-the-trainer methodology. Gift of Hope is transitioning from a legacy ERP to Infor CloudSuite, leveraging Inovium's TACK Agile Deployment Methodology for iterative validation and reduced risk.

Inovium has successfully implemented workforce management solutions for various organizations, including MV Transportation, which serves as a relevant example for the City of Surprise. This project involved the implementation of Infor WFM with a focus on Time and Attendance. The engagement began with a three-to-four-week assessment phase, followed by an implementation period tailored to the client's evolving needs.

A key challenge of the project was identifying risks such as wage theft and optimizing existing custom rules to improve efficiency and compliance. Inovium provided recommendations for standardizing timekeeping processes and developing an operational model that could scale across multiple divisions. The client had been using a combination of legacy timekeeping systems, which were successfully consolidated into a streamlined Infor WFM solution.

Both projects highlight Inovium's ability to manage complex implementations with strict regulatory requirements, data conversion, and system integrations, aligning well with the City of Surprise's needs.

- iv. Please describe implementation barriers or challenges that have been experienced working within Arizona on implementations. What proactive steps are planned in this proposed project to mitigate against similar challenges?

**Response:** Inovium has not yet worked directly with the State of Arizona but has successfully implemented Infor HCM and WFM software in government and public sector environments. Common challenges in these implementations include regulatory compliance, data migration, stakeholder alignment, and user adoption.

To mitigate these risks, we will conduct an early compliance assessment, leverage Infor's integration capabilities for seamless data migration, and implement structured validation and testing. A dedicated governance model with regular stakeholder collaboration will ensure transparency, while a tailored training program and post-go-live support will drive user adoption and long-term success.

Our experience with public sector implementations ensures we can effectively navigate potential challenges and deliver a solution tailored to Arizona's requirements.

- v. What sets the product(s) and services that your firm proposes apart from competitors' products and services? Why should the City select your firm to partner with?

**Response:** Inovium distinguishes itself with a 100% successful project completion rate and a proven record of customer satisfaction. The Infor product we implement, is the most complete Public Sector solution in the industry and the only public sector product that can support:



Inovium's consultants average over a decade of experience and deep expertise in Infor's HCM and WFM software, we ensure smooth integration with existing systems while maintaining compliance with municipal regulations. Unlike standard implementations, our ongoing configuration services provide continuous optimization, allowing the system to evolve with the City's needs.

We focus on long-term partnerships, offering dedicated support, customized training, and proactive enhancements to maximize system performance. Our commitment to successful delivery and customer satisfaction makes Inovium the ideal partner for the City, ensuring a streamlined implementation and lasting workforce management success.

## 1.4 USE OF SUBCONTRACTORS

- i. The Proposer shall identify any of the required Services that are proposed to be subcontracted, if any. This table is to be copied and filled out for each proposed subcontractor.

**Table 1-03: Subcontractor Questions**

Question	Response
Does your firm complete the implementations of the product being proposed or is this effort outsourced?	Inovium will complete the implementation with all on-shore resources located in the US and Canada.
Has or will any portion of the proposed work be completed by subcontractors or contract employees?	Inovium does have some full-time contractors located in Canada. They are considered full-time employees and are contractors by personal choice.
<b>This below portion of the table is to be copied and filled out for each proposed subcontractor.</b>	
Name of subcontractor and address	Inovium is not subcontracting this project.
Summary of Service and estimated percentage of Work the subcontractor will be providing.	N/A
Reasons for subcontracting	N/A
Experience	N/A
Detailed subcontractor responsibilities	N/A
Previous history of projects using the named subcontractor	N/A
Any additional relevant information	N/A

The City reserves the right to request a copy of the prime contractor/subcontractor contract verifying the prime contractor has the sole responsibility for any and all Services under this RFP and is financially liable, without exception, to the City for all Services contracted by the Proposer and the subcontractor under this RFP.

The City reserves the right to request additional information regarding the subcontractor(s) as it relates to references, history of the firm, and other relative information that has been required of the Proposer to submit in this RFP.

The substitution of one subcontractor for another may be made only at the discretion and prior written approval of the City.

- ii. By signature (electronically or via ink) below on the Certification of Subcontractors/Partners, the Proposer and the Subcontractor/Partner certify that the Proposer has received the permission of the third-party to include the scope of software and services under the cover of the submitted proposal.

**Table 1-04: Certification of Subcontractors/Partners**

Entity	Company Name	Representative Name	Title	Telephone Number	Email Address
Proposer	Inovium, LLC	Tessa Thomas	Customer Experience Manager	<u>904-762-5445</u>	<u><a href="mailto:tessa.thomas@inovium.com">tessa.thomas@inovium.com</a></u>
Partner/Third-party software provider	Infor, Inc	Heath Cockburn	Sales Manager	<u>706-260-5824</u>	<u><a href="mailto:heath.cockburn@infor.com">heath.cockburn@infor.com</a></u>
Partner/Third-party software provider	Infor, Inc	Tamara McKee	Account Exec	469-998-2552	<u><a href="mailto:Tamara.McKee@infor.com">Tamara.McKee@infor.com</a></u>



## Tab 2 – Software Solution

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### 1.5 SUMMARY DESCRIPTION OF EACH FUNCTIONAL AREA

Proposer to provide a summary description of the capabilities for **each functional area** contained in the RFP, in narrative format (**minimum two well-developed paragraphs per functional area**). The purpose of this summary is so that the City has a high-level understanding of the proposed solution. The narrative should be written for an audience of the end-user community. Descriptions should be included for any products proposed by third parties to meet the capabilities described in the Functional and Technical Requirements in Attachment B.

**Response:** Inovium offers a high-level overview of each functional area's capabilities in response to the City's Request for Proposal (RFP) for **a *Human capital management enterprise system***. This summary demonstrates how our suggested solution meets the demands of the City, improves operational effectiveness, and is consistent with long-term objectives. We thoughtfully plan every functional area to guarantee smooth integration, intuitive workflows, and strong support, providing value now and in the future.

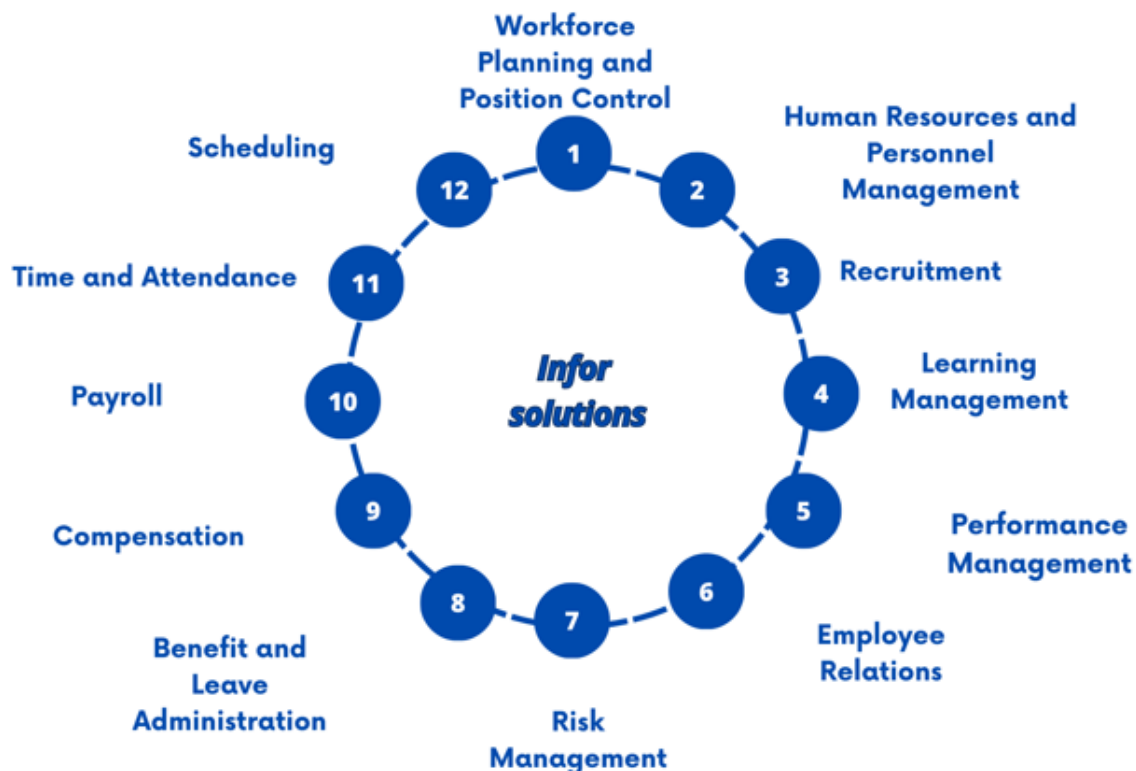
**Workforce Planning and Position Control:** Infor WFM provides complete workforce planning and position control, which makes it possible to manage labor effectively in line with strategic objectives for an organization. This module streamlines workforce planning and allows for the proper creation of precise, data-based labor budgets and forecasts. It combines historical performance, standards, and productivity factors through a bottom-up approach to the budgeting process so that it aligns perfectly well with top-down budgets as provided by the finance teams. The system automates solicitation and approval workflows, which are non-administrative in nature, and also ensures that organizational policies are met. With the provision of dashboards and alerts, managers can easily view the progress with discrepancies and maintain budget adherence.

The module connects long-term workforce planning to shorter-term labor forecasting for seamless integration between strategic objectives and operational execution. Automated re-forecasting by organizations enables business needs to evolve in real-time. This makes the workforce deployment efficient and cost-effective while adjusting to changes in demand or resources. Advanced forecasting tools make it possible to compare side-by-side budget projections, thereby making it easy for decision-makers to align workforce needs with financial goals. The position control tools that Inovium solution offers also enable organizations to define, track, and manage job roles and staffing levels accurately. Organizations are able to make the right decisions in terms of resource allocation and utilization of positions due to user-friendly interfaces. The capture, assessment, and reporting on position needs allow for future workforce requirements without being redundant or having a shortage. Infor's WFM, therefore, integrates position control into broader workforce planning, thereby allowing an end-to-end solution that optimizes labor resources and hence keeping in line with organizational goals.



**Human Resources and Personnel Management:** Infor HCM offers the most advanced human resources and personnel management module, a module that integrates HR operations within the framework of strategic organizational objectives. At the core, the solution is the centralized system of record that effectively manages every employee's personal details, employment, job assignments, and compliance documentation, among others. The system includes an easy interface with infinite user-defined fields and flexible configurability. This allows an organization to customize the system to meet specific needs without influencing the integrity of the source code and future updates. Centralizing data on HR, as well as the automation of all key processes that include personnel action and compliance tracking, reduces administrative burden and improves operation efficiency. All the core competencies of a human resource system, such as benefits administration, absence management, and workforce compliance, are integrated.

Infor's HCM provides employees and managers with direct access to HR-related tasks, including requesting time off, updating availability, and approving workflows, thus reducing their dependency on HR teams and enhancing engagement. This system also has features that enhance compliance by automatically giving alerts, document storage, and reporting in detail to cater to regulatory as well as organizational requirements. With its access from any mobile device, employees and managers can securely perform HR work from anywhere, anytime. Tools like competency frameworks and organizational charts provide actionable insights for talent development and succession planning and enable the HR team to make strategic decisions that help align its work with those of the broader organization.



**Recruitment:** Talent Acquisition is a core component of the Infor HCM suite, designed to streamline and enhance the recruitment process, enabling organizations to attract, engage, and onboard top talent efficiently. This solution supports the entire recruitment lifecycle, from requisition creation and candidate sourcing to onboarding. The system equips recruiters with the ability to manage large volumes of applications while maintaining organizational and regulatory compliance through features such as mobile-friendly candidate applications, automated requisition management, and advanced screening tools. With Infor Talent Science, hiring is further optimized by using predictive analytics to identify candidates who best fit specific roles, thereby reducing turnover and increasing organizational efficiency.

This module offers recruiters and candidates a seamless, self-service experience. With easy interfaces for job application, uploading documents, and viewing the application status, applicants can conveniently do this while giving recruiters more substantial tools for the management of postings, interview scheduling, and communications with candidates. The system facilitates collaboration since it allows hiring teams to share their feedback and decide within one central platform. Infor Talent Acquisition also includes onboarding features to ensure a smooth transition for new hires, with customizable workflows that address compliance, documentation, and employee orientation. Integration of recruitment data with other HCM modules gives organizations valuable insights into workforce trends and the effectiveness of their talent strategies.

**Learning Management:** Infor's Learning Management is a high-performance solution meant to help an organization deliver, track, and optimize learning experiences within its workforce. This module creates engaging and personalized learning paths aimed at individual and team development. The system provides support for many formats, from online courses and instructor-led training to on-the-job learning, and ensures accessibility as well as flexibility for different kinds of learning. Built-in analytics and reporting provide insights into training effectiveness and compliance, helping organizations identify skill gaps and measure the impact of their learning programs on performance and productivity.

Infor Learning Management fosters employee engagement and career growth by aligning learning opportunities with organizational goals and individual aspirations. Employees and managers can access their learning plans, track progress, and explore new opportunities through intuitive dashboards and mobile accessibility. Robust course creation tools, certification tracking, and compliance reporting are given to administrators, all of which help to simplify the management of training programs. Furthermore, integration with other modules, including performance management and succession planning, provides an end-to-end view of workforce development. Infor Learning Management can create a culture of continuous learning and development that allows an organization to stay ahead in a constantly changing business environment with an agile workforce.

**Performance Management:** Infor Performance Management is a cutting-edge solution that helps organizations assess, develop, and optimize employee performance in alignment with business objectives. This module provides a structured yet flexible framework for evaluating individual and team performance through real-time feedback, goal tracking, and tailored

appraisals. Managers can align employee goals with organizational priorities using cascading objectives that ensure clarity and accountability across all levels. It supports data-driven decision-making through performance analytics, detailing top performers and areas for improvement. The module fosters transparency and collaboration and empowers employees to achieve their full potential and contribute to overall organizational success.

Infor solution improves the performance review process by including tools for continuous feedback, development planning, and recognition. Employees will enjoy access to real-time, dynamic dashboards revealing progress toward achievement of goals and training opportunities based on performance metrics. Through intuitive tools and dashboards, managers can utilize constructive feedback and direct recommendations for areas of development through real-time tracking for improvement. Data from the modules of Talent and Learning Management also feed into succession planning and skill improvement initiatives. Infor Performance Management creates a culture of continuous improvement and recognition, thus helping organizations retain top talent and build a workforce that consistently delivers outstanding results.

**Employee Relations:** Infor Employee Relations is an all-around module designed to handle and enhance workplace interactions to ensure consistency, compliance, and equity in dealing with employee concerns. This solution enables HR teams to document, track, and resolve cases around coaching, discipline, grievances, and other matters at the workplace level. The system also ensures that all activities related to centralized employee relations data are placed securely in accessible environments. More details on a case can always be tracked accurately and maintained while noting incidents, their associated actions, and their resolutions through proper compliance checks for future usage.

The configurable workflows and reporting of the module will enable HR professionals to identify patterns, monitor trends, and proactively address workplace issues before they become major issues. Integration with other HCM components, such as performance management and learning, also enhances collaboration and ensures a holistic approach to managing employee relations. Moreover, automated alert and notification generation tools help HR teams keep track of deadlines and respond to employee concerns in a timely manner. Infor enables organizations to promote a consistent and fair approach to employee relations, thus enhancing workplace harmony, building trust, and driving employee engagement.

**Risk Management:** The Infor Risk Management module is designed to help organizations identify, mitigate, and monitor workplace risks for a safe and compliant working environment. This solution tracks incidents, near-misses, and workplace hazards on a centralized platform to allow the organization to respond quickly and effectively to potential risks. With a user-friendly interface, safety managers and employees can easily document observations, report safety concerns, and track follow-up actions. It gives detailed reporting and analytics capabilities to understand trends and patterns so that organizations can proactively act to prevent similar incidents from happening in the future.

The module integrates with other components of HCM, such as Occupational Health and Employee Safety, for a comprehensive approach to workforce risk management. The module helps an organization to meet the regulatory requirements of OSHA reporting by automatically

offering workflows for documentation and reporting. The attachment of supporting materials, including photographs and incident reports, ensures proper recording. Infor Risk Management solution ensures employees' safety and reduces liability and costs related to workplace incidents while providing actionable insights and streamlining processes that create a culture of safety and accountability within the organization.

**Benefit and Leave Administration:** Infor Benefit and Leave Administration is a fully integrated solution that allows organizations to manage complex benefit plans and leave policies with ease and efficiency. The module enables organizations to design and administer different types of benefit plans, such as medical, dental, vision, and retirement, while also managing employee eligibility and enrollment processes. Employees can easily view and select benefit options, add dependents, and upload required documentation through an intuitive self-service portal. The system also provides for life events like marriage, childbirth, or open enrollment periods with automated workflows that ensure timely and accurate processing.

The module provides comprehensive tools for leave management: it handles accrual calculations, eligibility determinations, and approvals. Employees and managers benefit from visibility into leave balances, requests, and schedules, which enable better planning and decision-making. The solution also automates compliance with federal and state leave laws such as FMLA through automated notifications, tracking of documentation required, and detailed records. With the integration of payroll and time management systems, there is a seamless leave data flow, which reduces errors and overheads in the administration process.

**Compensation:** Infor Compensation Management is a comprehensive platform for designing, implementing, and managing competitive compensation programs. The solution is built to streamline pay-for-performance initiatives, compensation planning, and equity distribution while ensuring alignment with organizational budgets and objectives. It enables HR and management teams to use data-driven insights to make informed decisions about salary adjustments, bonuses, and incentives. The compensation plan management will be made easy and flexible by having administrators define pay structures, manage merit increases, and establish incentive programs that reward the employees with the highest performance without violating financial boundaries.

The module further streamlines the intricacies of compensation management through the integration with performance reviews and budget planning. Personalized dashboards will be provided to the employees and managers so that they can access their compensation details, pay structures, and rewards. The system ensures that the process is transparent and fair because it allows HR teams to monitor compensation in real-time and adjust where there are disparities or gaps as they arise. Our Compensation Management helps organizations retain top talent, enhance employee satisfaction, and maintain competitiveness in the labor market through the automation of key processes and robust reporting capabilities.

**Payroll:** Infor Payroll is a reliable and highly scalable solution that is designed to streamline payroll processing with accuracy, compliance, and efficiency. This module automates complex payroll functions such as tax calculations, wage garnishments, and multi-jurisdictional compliance, which reduces the administrative burden on HR and payroll teams. It has the ability

to integrate with the broader HCM suite. This payroll data flows from time and attendance to benefits administration and then financial systems without having to do any manual entry and thus avoids the risk of error. Real-time visibility is offered through customizable dashboards into payroll operations, so the HR and finance teams can track processing progress and correct issues proactively.

Infor Payroll has the ability to improve employee satisfaction because it ensures on-time and accurate payments, including self-service portals where employees can view pay stubs, manage direct deposit details, and access tax documents. It supports a range of reporting capabilities, including compliance reports for federal and state regulations, workers' compensation filings, and year-end tax documentation. Built with flexibility and scalability in mind, Infor Payroll accommodate organizations of all sizes and complexities-from managing payroll for thousands of employees to handling specialized needs such as union agreements or international operations. By automating payroll processes and providing robust analytics, Infor Payroll helps organizations improve operational efficiency and maintain compliance with ever-changing regulatory requirements.

**Time and Attendance:** Infor Time and Attendance is a strong module that accurately captures real-time work hours for the employees, hence ensuring compliance and simplifying the payroll process. The solution auto-captures time using multiple methods such as mobile devices, biometric systems, and web-based clock-ins, which in turn reduce errors and improve the accuracy of data. It also provides real-time calculation of pay rules, considering overtime, shift differentials, and collective bargaining agreements. Manual processes are eliminated, thereby reducing overpayments and payroll discrepancies while validating time and labor data collection.

Employees and managers have very intuitive tools available. Employees can access self-service features to view timesheets, submit requests for time off, and attest to hours worked, while managers can approve timesheets, monitor attendance trends, and address compliance issues through real-time alerts. Integration with other modules in Infor software, including scheduling and payroll, can help the systems interlink for efficient data flow between system applications, thereby reducing administrative workload and even improving decision-making. With the provision of comprehensive reporting and analytics, there can be actionable insight into labor cost, attendance patterns, and productivity in a workforce for improved operations and also for labor regulation compliance.

**Scheduling:** Infor Scheduling is an agile and adaptive solution that empowers organizations to create efficient, compliant, and employee-friendly work schedules. Through the use of advanced algorithms and labor forecasting, this module creates the most optimized schedule possible by making the available workforce in step with business demand in keeping with labor laws, union agreements, and other company policies. It also offers an easy multi-view interface for managers in shifting people, finding shifts, and managing scheduling gaps in real-time. The availability of various organization tools- including self-scheduling, rotation management, and automated shift assignments- allows for a wide range of operational activity changes without losing efficiency.



The module also encourages employee engagement, allowing employees to input their availability, swap shifts, and view schedules from mobile or web-based platforms. Managers can keep tabs on compliance, monitor attendance, and make adjustments on the go using intuitive dashboards and alerts. Integration with Infor Time and Attendance enables accurate pay calculation and tracking for compliance, minimizing administrative burden and payroll discrepancies. Through streamlined scheduling and a seamless experience for both employees and managers, Infor Scheduling will help organizations to optimize productivity, reduce labor costs, and foster collaboration in the workplace.

## 1.6 SOFTWARE DOCUMENTATION FEATURES AND FUNCTIONS

Proposer to provide a summary of their software documentation that describes the features and function of the proposed application software. Identify what makes your documentation user-friendly and useful to the end user and technical user of the software.

**Response:** Inovium offers complete, user-centric software documentation to help both end users and technical users to use the Infor application software effectively. The documentation is structured for different audiences and provides non-technical users with intuitive guides while providing IT professionals with detailed technical manuals. Some of the key resources include user manuals, administrator guides, quick-start tutorials, and extensive online help documentation available through Inovium's Knowledge Base and support portals. Interactive multimedia content such as videos, FAQs, and best practices help users find the information they need quickly by supplementing these resources. What sets our software documentation apart is its emphasis on usability and accessibility. Clear step-by-step instructions, context-sensitive help, and examples of the specific tasks users perform within the software facilitate end-users successful work completion. Visual aids, including screenshots, diagrams, and flowcharts, further enhance users' understanding and ability to complete tasks efficiently. For technical users, our software documentation goes into greater detail on the advanced features like system integration, configuration, and API utilization with troubleshooting guides and performance optimization tips. Regular updates ensure that documentation stays in line with enhancements in the software and compliance requirements. With this combination of comprehensive content, accessibility, and relevance, our software documentation helps users get the maximum value from the application with the least amount of training and support intervention.

## 1.7 PROPOSED SOFTWARE MODULES TABLE

Proposer to complete the table below. Proposed modules that are required to satisfy the requirements associated with the functional areas identified below cannot be proposed as complementary or optional.

**Table 2-01: Proposed Functional Areas/Modules**

Proposed Software Information	
Product Component/Suite	Infor HR Talent

Proposed Software Information	
(Name and Version of the Proposed Software Solution)	Infor WFM
Time on Market	Infor WFM and Infor HR Talent over 5 years.
Release Date of Most Current Version	Infor WFM 10/2024      Infor HR Talent 2024
Next Major Release Date	The next major release is scheduled for April 2025. Infor WFM follows a biannual release cycle, with major updates occurring in April and October each year.
Next Minor Release Date	Infor WFM releases minor updates on a monthly basis to provide continuous improvements and enhancements.
Was the product proposed originally developed by your firm, or was the product acquired from another developer/entity?	Infor HCM was originally developed by Lawson Software, Inc. and later merged with Infor, Inc. in 2012. Infor WFM was developed organically in-house by Infor.
If the proposed product was acquired, what was the date of acquisition?	Infor acquired Lawson software and rearchitected and rewrote the solution on a modern platform and multi-tenant cloud and has been adding feature enhancements since 2011.
What is the future roadmap for the proposed product? Is there an end of sales or support date for the product?	Infor considers specific product roadmap information confidential at this stage of the selection process. Upon notification of shortlist or serious intent to consider, we will work with you to provide additional detail related to our solution roadmap. Our product roadmap provides our customers and prospects with guidance for the next 24 months. The product roadmap is carefully crafted, taking into consideration input from clients, industry analysts, and technology visionaries, and is constantly updated to reflect our forward-looking vision. Our current roadmap includes the execution of key strategic initiatives such as a focus on delivering contextual industry- and role-based user experiences, built-in industry best-practice processes, artificial intelligence, automation and insights, and last-mile capability built on an open platform supporting heterogeneity for competitive advantage.
Does your company have plans to release a differing product that offers the same or similar functionality in the next 5-10 years?	Please see the previous response.
Licensing	

Proposed Software Information	
Describe how the software is licensed (e.g., named user, concurrent users, enterprise/site, power user) and the options available for licensing:	Infor HR Talent and WFM are licensed by named user.
How many licenses have been proposed?	1600
Are the same licenses required for all users, or would some users (e.g., those only accessing employee self-service) have a different license type than other users (e.g., Human Resources Director)?	A license is required for each active and inactive employee managed by the application.
How are new users added to the system? Are there incremental costs per user?	The total number of individuals who are or have been employees of Customer (whether employed on a full-time, part-time, seasonal or other basis) or independent contractors of Customer (whether engaged directly or through a third party as contract workers, consultants, freelancers or other capacity). For licensing purposes, former employees and independent contractors of Customer shall only count as Employees if their data is maintained or processed by the Software for administrative, pension, or payroll purposes. Within thirty days following each anniversary of the Order Form Date (each an "Anniversary"), Customer will provide details regarding the total number of Employees as of such Anniversary. If the actual number of Employees as of an Anniversary is in excess of the specified authorized quantity of Employees as of such Anniversary, the Customer will purchase additional authorizations corresponding to such excess amount.
If an existing user separates from service at the City, may their license be re-assigned to a new staff member, or, must a license remain assigned to that staff member in order to maintain employee records/retiree benefits/etc.?	The total number of individuals who are or have been employees of Customer (whether employed on a full-time, part-time, seasonal or other basis) or independent contractors of Customer (whether engaged directly or through a third party as contract workers, consultants, freelancers or other capacity). For licensing purposes, former employees and independent contractors of Customer shall only count as Employees if their data is maintained or processed by the Software for administrative, pension, or payroll purposes. Within thirty days following each anniversary of the Order



Proposed Software Information			
		Form Date (each an "Anniversary"), Customer will provide details regarding the total number of Employees as of such Anniversary. If the actual number of Employees as of an Anniversary is in excess of the specified authorized quantity of Employees as of such Anniversary, Customer will purchase additional authorizations corresponding to such excess amount.	
Deployment Model			
Deployment Models Proposed to the City (Corresponding Attachment C Cost Worksheets shall be completed for each separate deployment model proposed)	City-Hosted (Perpetual License)	Proposer-Hosted (Perpetual License)	Software-as-a-Service (Subscription)
	<input type="checkbox"/>	<input type="checkbox"/>	<b>X</b>
Summary of Modules Proposed			
No.	Functional Area	Name of Proposed System Module(s) to Address Requested Functional Area	Previous Third-Party Partnerships and/or Solutions Successfully Integrated* With
1	Workforce Planning and Position Control	Infor WFM	Many, including Workday, ADP, Oracle, SAP, Tyler Munis and Dayforce
2	Human Resources and Personnel Management	Infor HR Talent	Many, including most major ERP vendors
3	Recruitment	Infor HR Talent	Many, including most major ERP, background check, and job board vendors
4	Learning Management	Infor HR Talent	Most any vendor that is SCORM compliance
5	Performance Management	Infor HR Talent	Many, including most major ERP vendors
6	Employee Relations	Infor HR Talent	Many, including most major ERP vendors

Proposed Software Information			
7	Risk Management	Infor HR Talent	Many, including most major ERP vendors
8	Benefit Administration and Leave Administration	Infor HR Talent	Many, including most major benefit providers
9	Compensation	Infor HR Talent	Various compensation data providers.
10	Payroll	Infor HR Talent	Not typically integrated other than tax compensation data
11	Time and Attendance	Infor WFM	Most major ERP and Payroll vendors
12	Scheduling	Infor WFM	Many and mostly custom integrations of driver data.
<i>*Successful integration should include only those instances where both the software and the client are in production environments.</i>			

## 1.8 OPTIONAL AND COMPLEMENTARY MODULES

What other system modules or products, not included in the scope of your proposal, would the Proposer recommend to be complementary or optional to the Project Scope?

**Table 2-02: Optional and Complementary Modules**

No.	Module Name	Narrative Description of Functionality Provided
1	Infor CloudSuite for Public Sector	Full ERP built for the Public Sector
2	Infor Utility Billing	Utility Billing for Surprise's Water Dept.
3		

## 1.9 PARTNERSHIPS/THIRD-PARTY PRODUCT RELATIONSHIP

- i. Proposer to fill out the table below for each of the Partnership/Third-Party software product proposed.

**Table 2-03: Partnership and/or Third-Party Product Identification**

Name of Partnership/Third-Party Software Firm	Name of Software Product	Name of existing Clients using Proposer's system and the Partnership/Third-Party Software	Number of years Client has been using the two products together
Infor, Inc.	HCM & WFM	35 current customers using Infor solutions. We are an Infor Alliance Partner and Reseller	Please refer to references

- ii. For each product proposed as a Partnership/Third-Party product, detail the options available to the City as it relates to contracting relationship between the City and the Partnership/Third Party.

**Response:** Inovium is proposing a pass-through cloud relationship. The City can certainly contract with Infor for the product directly.

- iii. Proposer to provide the approach and responsibilities for managing the implementation and acceptance testing for each of the proposed Partnership/Third-Party products.

**Response:** Inovium manages the implementation and consulting, and Infor provides the cloud software licensing and ongoing product technical support.

- iv. Proposer to provide the approach and responsibilities for the SLA/maintenance related to the Partner/Third-Party provider.

**Response:** Inovium will provide the account management of the relationship for the duration of the City being a customer. Infor will provide the software, hosting, and committed service levels. Infor monitors uptime and security, which is also covered as part of the SLA, and penalties

therein via the cloud agreement included in this proposal.

## Roles and Responsibilities

- **Infor:**
    - o Software provider and maintainer
    - o Owner of SLA compliance and enforcement
    - o Coordinates scheduled maintenance activities as well as managing issue escalation and resolution
  - **City Stakeholders:**
    - o Report the case or service outage to Inovium.
    - o Provide periodical reviews on whether SLA requirements are met and systems maintained.
- v. Proposer to submit six references and qualification statements for each of the proposed Partners/Third-Party firms and attach as an Exhibit to Tab 2 (see Tab 11 for References instructions).

**Response:** Confirmed, Exhibit attached

- vi. Proposer shall indicate if the proposed approach utilizes a systems integrator or consulting firm as the third-party.

**Response:** Not applicable

## 1.10 GENERAL

- i. Proposer shall clearly indicate the deployment model(s) proposed from among the three categories presented in a-c below. If more than one product is proposed, please clearly identify the deployment model for each product proposed:

**Response:** Inovium is proposing a Software as a Service (SaaS) model by reselling Infor's cloud-based solutions.

- ii. Proposer shall fully describe the integration/interface/data exchange capabilities of the proposed system, including available API's, middleware, web services, etc.

**Response:** The Infor solution set includes a robust integration platform as part of the suite. This includes APIs via web services, and file-based integration capabilities over secured connection. This includes:

- **APIs Available:** The system is accompanied by a comprehensive library of RESTful and SOAP APIs that allow for secure, scalable, and real-time data exchange between the proposed solution and third-party systems. These APIs are well-documented and provide endpoints for core functionalities such as workforce management, payroll, benefits, and talent acquisition. This ensures the City will integrate the solution with other applications like ERP systems, time collection devices, and reporting tools.

- **Middleware and Web Services:** Inovium uses Infor OS as its middleware platform, which acts as the central integration hub to manages the flow of data across various applications. Infor OS facilitates seamless data transformation and mapping, ensuring compatibility between different systems by adjusting data formats. It also automates workflows and triggers, executing predefined business rules to improve operational efficiency. Furthermore, the platform will ensure safe exchange of data as it supports encryption protocols, protecting the confidentiality and integrity of data transferred. It also supports pre-built connectors and templates to many third-party applications, thus speeding up the effort to implement as much as three times.
- **Features for Data Exchange and Integration**
  - o **Batch and Real:** It supports both batch imports and exports as well as real-time data synchronization where necessary.
  - o **File-Based:** Data transfer involves file format functionalities, which involve CSV, XML, and JSON for scheduled data transfers.
  - o **Webhooks and Event-Based:** Using webhooks for event-driven integrations for a data exchange having event-based push notification.
  - o **Cross-System Reports:** Integration for analytics platforms and Infor Birst ensures cross-system reports by aggregating data from multi-sources.
- **Flexibility and Scalability:** Infor's architecture is modular and scalable, so it can be easily integrated with existing systems and well adapted to advancements in future technologies. Integration capabilities are supported by comprehensive support systems, which include access to integration experts as well as detailed technical documentation at all stages of setup and for ongoing maintenance.

iii. For available API's, does the proposed pricing include access to the entire API library? What functionality is exposed in the systems' APIs?

**Response:** Yes, Various Infor REST APIs come standardly provisioned out-of-the-box. Infor OS APIs (User management, data fabric, AI/ML, doc management, integration, extensibility) are available in REST format along with WFM APIs. There is OAUTH-2 security in place for these APIs, and each endpoint comes with Swagger documentation for the end-user to test the API functionality for each of the different endpoints.

iv. Proposer shall describe available time clock options to support time capture functionality. The City will consider these on an optional basis, and costs shall not be included in the technical proposal.

**Response:**

### 9000-series Time Collection Devices

Beyond offering a modern time and attendance solution, Infor Workforce Management also allows you to integrate time collection devices that submit intelligent data to your time and attendance system. The 9000-series time collection device is a Linux-based, fingerprint biometric device that combines a 7-inch color touch display with a powerful processor to provide advanced features that integrate with your time and attendance solution. In addition to

standard time tracking features the device provides offline capability, a braille keypad, a 4-hour battery, optional connectivity options such as Wi-Fi and 3G, and support for a wide array of badge technologies.

### **Benefits of the 9000-Series**

Using biometric technology, users can easily and more accurately enroll on the terminal-controlled finger placement which reduces finger read error rates for a more accurate biometric enrollment.

The device can help you:

- Track employee attendance and absence
- Enforce schedule validation and meal breaks
- Communicate work schedules (including changes)
- Approve time worked (by day or week)
- View schedules and swipes
- Use multiple identification methods
- Use PIN or biometric verification
- Supervisor mode

### **Hardware Features:**

- 7-inch display
- 1GHz high-performance single core processor
- 1GB DDR3 RAM, 512MB NAND FLASH
- 8GB of mass storage
- Visual LED indicators
- Braille keypad
- External readers — Wiegand compatible

### **Optional Hardware Features:**

- Barcode, Magnetic, HID Prox, Mifare, iClass
- Biometric Suprema or Lumidigm Reader

- POE, Wi-Fi, 3G connectivity
- Speakers
- Battery (4 hours)

The 9000-series give you the competitive advantage by allowing you to overcome the complexities and challenges of collecting, tracking, and integrating the critical information of your workforce activities.

- v. Please describe how the proposed solution(s) support accessibility and ADA compliance, in addition to the following specific questions.
- a. Does the software provide keyboard equivalents for all mouse actions, including buttons, scroll windows, text entry fields, and pop-up windows?

**Response:** Yes, the software does provide keyboard equivalents when mouse actions can't be used.

- b. If information is provided in an audio format, is it also capable of being displayed by the user in a visual format?

**Response:** From a WFM perspective, the only information presented in an audio format is the shift broadcast feature, which calls a user's phone. However, this information is also sent visually via an SMS text message.

- c. Does the application support user-defined color settings system-wide? Does the software ensure that color-coding is never used as the only means of conveying information or indicating an action?

**Response:** Yes, Infor WFM supports user-defined color-coding configurations such as for the shift statuses and font colors. There are other means of conveying information outside of just color-coding.

- d. Is special training available/provided for users with disabilities that will enable them to become familiar with the software and learn how to use it in conjunction with assistive technology provided as an accommodation?

**Response:** Infor's Training is available online and virtually, to accommodate differently abled users.

- vi. Describe your proposed reporting features native to the system, and how City staff will be trained to develop and configure their own reports.

**Response:** Infor's system has robust, native reporting capabilities designed to produce actionable insights across all functional areas. Our reporting is intuitive, scalable, and user-configurable therefore, city staff will be able to generate operational, compliance, and analytical reports according to their needs. This will be built upon the Infor Birst Analytics platform which

delivers enterprise-grade business intelligence with embedded data visualization and advanced analytics. Here are some native reporting features of our system:

- **Pre-built Reports:** The system offers a vast, prebuilt report library addressing the areas of payroll, workforce performance, benefits usage, and compliance. These reports can be used without extensive setup to help staff get closer to answers.
- **Customizable Dashboards:** Users are able to build personal dashboards that tracks key performance indicators. The dashboard can be built using drag-and-drop functionality without requiring technical expertise and combine data from multiple modules in a single view.
- **Ad-Hoc Reporting:** The platform will enable City staff to generate ad-hoc reports with a simple query builder. Users can select fields, apply filters, and define parameters to quickly analyze data for decision-making.
- **Advanced Analytics:** With Infor Birst, users can perform predictive analytics and trend analysis using built-in AI and machine learning capabilities. This feature supports strategic planning and forecasting.
- **Export and Integrate:** Infor allows its reports to export in various types of formats or be integrated outside of the organization for further analyzing through Microsoft Power BI.

**Training on Report Development:** Inovium provides system use enablement during each agile sprint. This will include train the trainer and City scenario demonstrations every 3 week sprint. We use this model to ensure your team has used the system as intended at a deep level by the go-live date. Additionally, Infor offers a library of classes and a curriculum as part of Infor Campus. Classes are typically \$1,000 per user.

- vii. What strategic decisions or direction is your firm taking or making related to the product being proposed today?

**Response:** Infor's product strategy is to develop industry-focused solutions that provide value to customers. Infor's products are designed to address the needs of specific industries, such as the proposed Infor Public Sector solution set.

### Key strategies

**Industry focus:** Infor's products are tailored to specific industries, such as healthcare, manufacturing, and distribution.

**Cloud-based solutions:** Infor's cloud-based solutions are designed to be agile and scalable.

**Data-driven decision making:** Infor uses data and feedback to make product decisions.

**AI-driven analytics:** Infor uses AI to identify and integrate complementary product lines, and to provide product recommendations.



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### ***Benefits of Infor's strategy***

**Shorter implementations:** Infor's pre-configured products for specific industries result in shorter, less expensive implementations.

**Improved business agility:** Infor's solutions help businesses manage operational complexity, improve visibility, and reduce risk.

**Better cost control:** Infor's solutions help businesses control costs.

## Tab 3 – Project Approach and Implementation Methodology

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### 1.11 PROJECT APPROACH

Proposer to provide a description of the proposed approach for providing the Scope described in the RFP, including a comprehensive description of the proposed implementation methodology for the Project. The description should include how the Proposer has developed this methodology to both incorporate lessons learned from experiences as well as to meet the needs described in the RFP.

- i. Based on information provided in this RFP and experience in working with other localities, what is the Proposer's perspective on the most significant risks to this Project, and how do you plan to mitigate these risks?

**Response:** With any project of this magnitude, the biggest risk to success is decision-making and the City having a deep understanding of your policies and procedures. Inovium's agile implementation methodology is designed to ensure an iterative, tested, and validated implementation aligned with the City's operational requirements and objectives. Our strategy is to define, build, and test in smaller incremental cycles ensuring less chance for missed requirements at go-live.

Here are the key components that we will follow in our approach:

- **Project Planning and Initiation:** Inovium begins with a thorough kickoff to ensure all city stakeholders are in agreement with the project's scope, goals, schedule, and deliverables. We will create a comprehensive strategy that project cadence, rigor, responsibilities, and high level phases. At this point, we use the knowledge gained from earlier implementations to detect and reduce possible hazards as soon as possible.
- **Requirements Collection and Design:** Inovium will collaborate with the City to collect functional and technical requirements each sprint to ensure the solution fits with operational workflows that we will have documented in Business Driven Design (BDD) documents.
- **Configuration and Deployment:** Inovium will configure the system in accordance with the requirements while leveraging industry best practices and standards to satisfy the City's needs. To guarantee smooth interoperability with current systems, we'll validate relevant configurations, integrations, or data conversions during each sprint.
- **Testing and Validation:** The city will leverage the BDDs to perform unit, integration, system, and user acceptance testing (UAT) during each sprint and once more at the end of the Build phase. This final UAT will also include parallel testing for payroll to ensure system reliability under peak loads.
- **Training and Change Management:** Inovium will provide train the trainer enablement and employee job aids.

- **Go-Live and Post-Implementation Support:** Inovium ensures the implementation process runs smoothly during go-livings, with remote support to monitor the system and resolve issues that will arise. Our post-implementation support includes the entire project team being on the ready for 2 weeks post go-live.
- ii. With what frequency will Proposer's Project Team staff be on-site at the City during implementation? Will staff be on-site for full or partial weeks? Has the proposed approach been standard for other implementations?

**Response:** Inovium utilizes a remote-first approach for implementation, ensuring efficient collaboration while minimizing disruption to City operations. Our proven train-the-trainer model empowers key City personnel with the knowledge and skills to support end-users effectively, ensuring long-term success.

The implementation will be managed remotely using structured virtual sessions, real-time collaboration tools, and continuous communication to maintain project alignment. This approach allows for seamless knowledge transfer, progress tracking, and system optimization without the need for extended on-site presence.

This remote strategy has been successfully applied in similar projects, ensuring efficiency, responsiveness, and a smooth transition while maximizing resources and minimizing operational disruptions.

- iii. Describe in detail the approach to developing interfaces/integrations/data exchanges. What is the division of responsibility between the City and Proposer project teams? What technical skills are required of City staff for this work?

**Response:** Inovium adopts structured and collaborative processes in developing interfaces, integrations, and data exchanges to allow seamless interoperability with the city's existing systems. Our team ensures the city staff will be given broad guidance and training throughout the project. This will minimize the necessity for specialized technical know-how, foster successful collaboration, and empower the city team to add value to the integration process with full confidence. Here are the steps that our professionals will follow for developing interfaces/integrations/data exchanges:

- **Requirements Gathering:** We will invite the City stakeholders to attend workshops to provide information on the requirements for integration, including data sources, system interfaces, and exchange frequency. We will document all the requirements for data mapping, including field-level transformations and validation rules.
- **Design and Architecture:** We will use the middleware of Infor to centralize managing data flows and integrations. We create integration designs by using the pre-built APIs, connectors, and templates in relevant places to hasten the process. We will also define the security protocols for safeguarding data with respect to exchanges such as encryption standards and access controls
- **Development and Configuration:** Our experts use built-in integration tools and standardized APIs for interface configuration. We will Implement batch and real-time

data exchange mechanisms based on the operational needs of the city. We will also develop custom adapters for systems that do not have pre-built connectors to ensure compatibility.

- **Testing and Validation:** We will conduct iterative testing, including unit tests, end-to-end integration testing, and user validation, to ensure data accuracy and system compatibility. Issues will be addressed promptly through collaborative troubleshooting with the City and third-party vendors.
- **Deployment and Monitoring:** We will deploy integration in a controlled environment and then to the live environment after all tests have been passed. We monitor post-deployment integrations using Infor OS's native tools for best performance and reliability.

### Division of Responsibility

The City Project Team will oversee several crucial tasks to guarantee the project's success. These include identifying requirements by recording current systems, data sources, and integration requirements to understand the project scope clearly. To facilitate a seamless transfer, the team must also make use of their experience with legacy systems to offer comprehensive insights into the data structures and functionalities of legacy systems. The City Project Team will work with our implementation team to verify the mapping of source systems and transformation rules is accurate during the data validation phase. Moreover, the team will actively engage in end-to-end testing with the goal of providing prompt feedback to improve and polish the system build.

Inovium will take full responsibility for integrating the Infor system portion of the configuration and integration into the City's existing infrastructure. Our team will design the integrations, defining all interfaces and data exchanges to ensure smooth interoperability. Through iterative testing cycles, we proactively identify and resolve integration issues, guaranteeing reliability and performance. Finally, Inovium ensures effective integration deployment and continuous implementation support during post go-live support.

### Technical Skills of City Staff

The project team in the city needs specific technical skills to support integration efforts effectively. Key skills include Data Analysis, which enables team members to review and validate data mappings and transformations accurately. We believe that system knowledge of existing legacy systems is essential for defining integration requirements and ensuring a smooth transition to the new solution. Furthermore, testing capabilities are required, and team members must have a basic understanding of testing methodologies to actively participate in validation activities. Collaboration tools like JIRA and SharePoint proficiency are also required for tracking progress, task management, and issue resolution.

- a. Following go-live of the software, what is the role of the Proposer in supporting the ongoing maintenance of developed interfaces/integrations/data exchanges?

**Response:** Inovium can provide ongoing functional support should the city decide they would like to engage in a support contract. Infor's support team provides the up-time and ongoing support of the application in their cloud.

Infor provides a help desk to handle queries, technical issues, and change requests related to integrations. Support is accessible through multiple channels, including phone, email, and an online ticketing system. For complex matters, Infor employs a structured escalation process to ensure senior technical experts address high-priority issues promptly. Infor's online knowledge base and training materials will be continuously updated, to enable the City staff to diagnose and resolve simple issues independently.

- iv. Describe in detail the approach to configuration and set-up activities. Will the Proposer team complete the majority of the configuration based upon information gathered from City subject matter experts, or will the City be expected to perform much of the configuration?

**Response:** Inovium configures and sets up the Infor system in a methodical and cooperative manner to ensure the system complies with operational needs. Our team will work closely with City subject matter experts (SMEs) to manage the majority of the configuration. This strategy keeps a customized and effective setup while reducing the City's resource burden. Inovium will provide a fully optimized and user-ready solution to satisfy the operational needs of the City while guaranteeing ease of maintenance and scalability by spearheading the setup process and integrating City input at critical points. Our approach will include:

- **System design and requirement gathering:** Inovium will start by holding configuration workshops with City SMEs to record workflows, business procedures, and system preferences. These meetings aid in the definition of integration points, approval structures, and user roles. Inovium uses this information to create system design guidelines that adhere to industry best practices while still being compatible with conventional Infor features. The delivered product will be Business Driven Design (BDD) documents.
- **System Parameter Configuration:** Inovium sets up the fundamental system parameters, such as user roles, security permissions, approval processes, and reporting frameworks, after the system design is complete. ensures a streamlined and scalable configuration process.
- **Data Mapping and Integration Setup:** Inovium transfers data from legacy systems to the Infor schema while preserving format and structure uniformity to guarantee a seamless data migration. Inovium will setup the Infor middleware settings and API connections to enable data transmission between Infor and any third-party applications. This stage reduces interruptions caused by integration and guarantees smooth interoperability.
- **Testing and validation:** Configured settings undergo unit testing to verify functionality and compliance with business rules. Inovium will work iteratively with City SMEs to refine configurations based on feedback during sprints and User Acceptance Testing (UAT). This continuous validation process ensures the system functions as expected before deployment.
- **Knowledge Transfer and Documentation:** Inovium will conduct train the trainer sessions as part of the enablement of each Agile sprint. City staff will perform walkthrus of each component configured during each sprint as well.

- v. Describe any additional assumptions made in the Proposal, not already identified in detail. These should include any assumptions related to the current City technical environment, staffing, project management approach, and City resources available during the implementation and support phases.

**Response:**

The following Infor functional areas are in scope for this project:

- GHR – Core HRIS
- GHR – Benefits Management
- GHR – Absence Management
- GHR – Payroll
- GHR – Performance Management
- GHR – Transition Management (Onboarding)
- GHR – Merit Compensation
- WFM – Time and Attendance

**The following configuration elements are in scope:**

**General**

- 1 State and City
- Up to 1,600 employees

**WFM**

- Up to 4 calculation groups (Sets of Labor Rules)
- Up to 3 pay groups
- One attendance plan
- Up to 2 Accrual Programs

**Core HR and Payroll**

- Standard employee record layout (up to 12 custom fields)
- Standard position layout (up to 12 custom fields)
- Single organizational hierarchy
- Up to 5 additional security roles

**Talent Management**

- One performance review form and workflow
- One onboarding process including local and federal legal forms
- One succession plan
- One compensation plan
- One Performance Review Plan and Workflow

**Inovium will lead and support the deployment of the Infor modules above with assistance from the City as follows:**

- Implementation includes a citywide configuration and assumes the City will deploy to additional sites. Inovium can be engaged to support future deployments for an additional fee.
- Inovium will lead discovery and design activities for the functionality described in this SOW.
- Inovium will review configuration options and configure the application as available out of the core offering. Any custom configurations are out of scope for this project unless otherwise noted.
- Inovium will support configuration defect resolution for items configured as part of this SOW for six (6) weeks after the solution has been promoted to production.
- Inovium to perform unit/functional testing on the newly configured items.
- The City will be responsible for planning and executing production cutover
- The City will be responsible for coordinating resources for all phases of testing: for regression testing, functional testing, system integration testing, and user acceptance testing activities
- The City will create and execute all Functional, Regression, SIT, and UAT test cases. Inovium will provide the Business Design documents to the City to assist in this testing.
- The City will log any defects related to the core application and lead and oversee defect calls for all phases of regression testing, functional testing, system integration testing, and user acceptance testing

**Elements excluded from project scope:**

- Creation of organizational change management materials; provided, however, that assisting the City with the development of Organizational Change
- Deployment of code within any City environment.
- End-user training.
- Any work effort beyond the post go-live support period
- live.
- Any items not specifically detailed in this response.

**Project Overall Assumptions**

- All supporting documentation work product will be developed for industry
- standard Microsoft Windows-based PCs using applicable (as reasonably
- determined by Inovium) Microsoft Office applications (Word, Excel, and
- PowerPoint).
- Unless otherwise expressly stated otherwise, no software developments will be made under this SOW.
- The City will provide necessary labor standards/productivity values for all configured locations



- The City will provide knowledgeable, decision-empowered resources that are available to work on the Project as part of the Project team.
- The Project will have sponsorship from City senior leadership, who will be available on a timely and regular basis to monitor the Project's progress and to act as a decision maker for policy decisions and issue resolution.
- The City will provide a working environment and facilities adequate for Inovium to perform its assigned duties. This includes but is not limited to, adequate conference rooms, cubicle space, and telephone access.
- The city will provide Inovium with all necessary authorizations.
- The City will support the use of the Inovium team laptops on its network, or the City will provide PCs with the Microsoft Office Suite and e-mail capability for the Project team.
- Inovium team members will be given access to the City environment.
- City shall provide secure dial-in and/or direct access to City networks, as necessary.
- Project work will be performed both onsite at City offices/locations and remotely at Inovium offices or subcontractor locations in accordance with the approved Project plan and schedule.
- Inovium will be provided with the necessary access to all City facilities necessary for the Project, including all necessary identification material (badges, cards, etc.), subject to the terms and conditions of the Agreement.
- This includes necessary access to such buildings and systems during and after normal business hours, on weekends, and on holidays.
- Limitation of Inovium access during these times may reduce Inovium's ability to maintain the proposed schedule.
  
- Inovium will also be provided with the necessary authorizations for remote access to the City's systems.
- Any customizations by the Inovium team are not in scope. This includes any changes to workflows.
- Only the configurations discussed in this SOW are required to turn on the defined new functionality and are in scope.
- The City will provide all requested documentation in advance of workshops, including applicable policy and procedure manuals.
- Any updates to existing City custom documentation are the responsibility of the City.
- The City will organize logistics for all required workshops (e.g. location, meeting rooms, internet access, projector, flipcharts, etc.) and coordinate City resource attendance.
- The City will provide an experienced project manager who will be responsible for coordinating the efforts of the City team, which includes but is not limited to, coordinating logistics for meetings, ensuring timely signoff on deliverables, resolving issues, etc.
- The City will be responsible for distributing Inovium Deliverables to internal resources for review and to coordinate sign-off in accordance with the agreed Project timeline.
- The City will promptly review all Deliverables and either accept or reject them in a timely manner, but in any event such acceptance or rejection will be no longer than five (5) business days after delivery by Inovium.



- Issues or events outside of Inovium's control that may impact Project timelines and/or project cost will be documented by Inovium via a formal Change Request form for approval by the City. These may include, but are not limited to, requirements changes, lack of timely decision-making by insufficient participation by City project team members and/or delays in project deliverables from external parties (if applicable).
- The City will make Inovium aware of any other projects, risks (current and future), blackout dates, holidays and absences which may affect Inovium's ability to meet the agreed project timeline.
- Project status meetings will be held regularly with core project team members, and SMEs (if needed) on a cadence mutually agreed upon by Inovium and City project managers.
- The only language in scope for this Project is English.
- All City workstations meet or exceed the software vendor's requirements regarding operating system, browser, and all other programs required for the software to function properly. City will be responsible for any end user PC hardware or software upgrades required to meet the documented minimum PC standards for Infor solutions purchased.
- The City will supply, install, and configure all necessary hardware and system operating software in accordance with vendor requirements, with guidance and support from Infor, including physical clocks.
- Any change to this requirements that affects the scope (by material reduction or addition), content, methods, or schedule shall be subject to mutual written agreement of the parties and shall be made in accordance with (Change Request) process. Inovium shall not commence work on any such change unless and until the change has been agreed to in writing by both parties.
- The responsibilities and assumptions are considered to be material contract duties of the City.

## 1.12 DEPLOYMENT

Proposer to provide a detailed narrative description of how the implementation approach will not vary between the deployment methods proposed (i.e., a City-hosted, Proposer-hosted and/or a subscription-based solution, etc.).

**Response:** Inovium is only proposing the Cloud

## 1.13 GO-LIVE AND ONGOING SUPPORT

Proposer to describe what level of pre- and post-go-live support is available under the proposed fee structure. If varying levels of support are available, this section of the RFP response should clarify these potential support services and highlight the level of support that has been proposed. Proposer shall use Attachment C, Cost Worksheets, to clearly identify the varying fees based on the varying levels of support that are available.

- i. What are the standard hours that support is offered, and through what means (telephone, web ticket submission, etc.)?

**Response:** Infor's support model includes a comprehensive approach to customer care. We have approximately 1,700+ support staff worldwide, dedicated to providing unparalleled support across all product lines. Our support organization resolves incidents, tracks response times, and provides software upgrades, patches, and service packs. We offer industry-tailored support through the Infor Support Portal, which provides access to tools, information, and people 24/7/365. Our support staff are certified on the applications they support and receive full training on each of the applications and updates. Additionally, our maintenance and technical support programs include software upgrades, updates, and corrections, as well as access to our knowledge base and product support team. Infor maintains a high customer retention rate, partly due to the service provided through our Infor Support offering, which has been recognized with multiple awards for customer excellence.

Responding promptly to customer requests is an important goal of the Infor Support team. Response times and Service Level Agreements are applied as outlined in Infor's standard agreements. For summary purposes, the "Response Target(s)" below are calculated as the difference between the time an Incident is appropriately logged into Infor Concierge and the time of Infor's first value-added communication. Value-added communication may include, without limitation, requests for additional information, the collection of error logs, findings from initial issue triage, timeline for the next step, or providing existing information from the Knowledge Base.

Infor will make commercially reasonable efforts to respond, based on the following targets for Premium Support:

**Standard Response Targets:**

- **Severity 1:**
  - **Infrastructure Incidents:** Within fifteen (15) minutes (24x7)
  - **Application Incidents:** Within one (1) hour (24x7)
- **Severity 2:**
  - **Infrastructure Incidents:** Within one (1) hour (24x7)
  - **Application Incidents:** Within one (1) business hour during scheduled coverage hours
- **Severity 3:** Within two (2) business hours during scheduled coverage hours
- **Severity 4:** Within four (4) business hours during scheduled coverage hours
- **Severity 5:** No set response target (Minor issue or enhancements). If the Severity 5 option is not available, the Software utilizes the enhancement request system for enhancement requests.

**Customer Success Plus Response Targets:**

- **Severity 1:**
  - **Infrastructure Incidents:** Within fifteen (15) minutes (24x7)
  - **Application Incidents:** Within thirty (30) minutes (24x7)
- **Severity 2:**
  - **Infrastructure Incidents:** Within one (1) hour (24x7)

- **Application Incidents:** Within one (1) business hour during scheduled coverage hours
- **Severity 3:** Within one (1) business hour during scheduled coverage hours
- **Severity 4:** Within two (2) business hours during scheduled coverage hours
- **Severity 5:** No set response target (Minor issue or enhancements). If the Severity 5 option is not available, the Software utilizes the enhancement request system for enhancement requests.

Incident resolution is often an investigative process that is iterative and may involve many variables. At times, resolution requires collaboration and troubleshooting by various teams within Infor and/or Customer to determine the root cause and bring the incident to resolution. The nature of this process makes providing target resolution times difficult since the facts and circumstances of incidents vary widely even within a severity level. To allow Customers to continue doing business while Infor addresses an incident, Infor may recommend workarounds or interim solutions and will endeavor to provide regular status updates.

- ii. Are after-hours and weekend support offered, and if so, is this part of the standard support offering or part of a different tier/offering?

**Response:** Please see above.

- iii. Describe the support that is offered to assist in potential situations where the City is unable to conduct certain mission-critical processes, such as processing payroll, due to emergency situations.

**Response:** Infor provides a robust support framework to ensure the City maintains operational continuity during emergencies that disrupt mission-critical processes such as payroll. Our approach emphasizes proactive preparedness, real-time responsiveness, and efficient recovery to minimize downtime and maintain operations. We are prepared for the potential disruptions through Infor's disaster recovery practices, automated data backups, and system redundancy, supported by geographically distributed data centers with failover mechanisms. We will train the City staff in emergency protocols to manage disruptions properly and ensure the continuity of critical processes such as payroll.

Infor provides 24/7 support, prioritizing mission-critical incidents with high-response SLAs in emergency situations. Temporary measures, such as manual payroll runs and alternate workflows, will be implemented to maintain operations until the primary system is restored. Infor recovery protocol focuses on restoring systems quickly and securely. Automated backups protect data integrity, and recovery workflow to prioritize the timely restoration of payroll processing. We will conduct post-incident audits to identify vulnerabilities and enhance system resilience.

Recognizing payroll as a core business function, Inovium ensures timely and accurate payments even during emergencies. Our pre-configured templates and backup tools enable

seamless payroll processing to ensure regulatory compliance when needed. Our collaboration with the City's payroll department guarantees timely employee payments, minimizing operational disruptions. This robust system ensures readiness, responsiveness, and resilience in maintaining critical operations like payroll during challenging times.

- iv. Is product support offered by Proposer, through the software developer/provider, or sub-contracted?

**Response:** Inovium is the authorized reseller of the HCM and WFM Software and partners with Infor to deliver a comprehensive solution. Product support will be provided directly by Infor, ensuring that customers receive expert assistance from the software developer. Infor's support services include:

- 24/7 access to Infor's customer support portal for issue tracking and resolution
- Direct engagement with Infor's technical support team
- Regular software updates, security patches, and enhancements
- Extensive documentation, training, and self-service resources

By leveraging Infor's dedicated support infrastructure, customers benefit from industry-leading expertise, timely issue resolution, and continuous software improvements.

- v. Are there optional, "enhanced" support tiers or offerings above and beyond what has been proposed?

**Response:** Yes, there are optional enhanced support tiers available beyond the standard support package. Inovium, as the reseller of the solution, provides foundational support services, while Infor, the software provider, offers additional premium support options. These enhanced support offerings may include:

- **Priority Support:** Faster response times and priority case handling.
- **24/7 Support Access:** Extended coverage beyond standard business hours.
- **Dedicated Support Resources:** Access to a dedicated account manager or support engineer.
- **Advanced Training & Consultation:** Personalized training sessions and strategic system optimization guidance.

- vi. How often are releases provided, how is advance notification provided to customers of upcoming releases, and what is the process to test each release?

**Response:** Inovium, using the Infor system, has established a formal, customer-centric release management process to ensure the system is up-to-date, secure, and efficient in delivering the services required by the City. Our major releases are usually annually or biannually with significant features, architectural changes, and improvement in performance; minor updates occur quarterly or according to the organization's needs based on bug fixes, security patches, and minor feature improvements. Customers are notified well in advance of the releases, allowing for adequate preparation and testing. Major releases are notified 30–60 days in

advance, while minor updates are communicated 2–4 weeks before actual deployment. With release notes, detailed changes, impact, and prerequisites are attached through email, the client portal, and the collaboration site such as SharePoint or JIRA. Inovium will also organize webinars and briefings to guide City stakeholders through the changes and address any questions regarding major updates.

Our testing process for each release ensures smooth deployment and minimum operational disruption. New releases are first deployed in a staging environment, allowing the City's IT team to conduct thorough testing without impacting live operations. During this phase, the workflows, integrations, and data accuracy are validated by using predefined test scripts to ensure all critical functionalities work as expected. Inovium will immediately resolve the issue that arises during testing. Key stakeholders and end-users from the City perform UAT after the development phase to ensure the release aligns with operational requirements and is ready for production. Once validation is complete, we schedule the release for deployment during a planned maintenance window to minimize disruption in the live environment. Through our proactive and collaborative approach with the City, we ensure each release is executed seamlessly, offering adequate technical support, thorough documentation, and clear guidance throughout the process. This structured release management framework ensures smooth system upgrades, keeping City operations efficient, secure, and aligned with evolving needs.

- vii. Would the City be able to test releases in a test environment prior to pushing updates to a live environment?

**Response:** Yes, the City will be able to test all releases in a dedicated test environment prior to deploying updates to the live environment. This is the best approach to ensure that updates are properly validated with all potential issues resolved before disturbing live operations.

- viii. Does the system have the ability to roll back updates should challenges or bugs be encountered?

**Response:** Yes, the proposed (**Infor**) system has rollback capabilities in case problems or bugs emerged with updates. Inovium plan all updates thoroughly, test them, and closely monitor all changes to ensure minimum risks, but if the situation is otherwise, the system will be restored to its stable previous state by rolling back functionality. Before deploying any update, comprehensive pre-update backups of data, configurations, and system settings are created to ensure all critical information is preserved. If a rollback were necessary, Inovium would work with the City's IT team to ensure the process is executed in a way that minimizes downtime and disruption. To further reduce risks, updates are thoroughly tested in staging environments before deployment.

- ix. Describe how often major and minor software updates are provided, as well as the level of City resources required for a major update and the level of resources required for a minor update.

**Response:** Inovium follows a structured release management process for the Infor system, ensuring software updates are delivered consistently while minimizing disruptions to the City's

operations. Major updates introduce significant enhancements, architectural improvements, and new functionalities, while minor updates focus on bug fixes, security patches, and performance optimizations. Below table shows the update frequency and City resource requirements.

Update Type	Frequency	Scope & Effort	City Resource Involvement
Major Update	Annually or Biannually	System-wide enhancements requiring configuration adjustments, testing, and training.	Medium to High – The City's IT team participates in User Acceptance Testing (UAT), reviews system changes, and ensures internal workflows remain aligned. Key users may require refresher training on new features.
Minor Update	Quarterly or As Needed	Bug fixes, security patches, and small feature refinements with minimal impact on workflows.	Low – Minimal involvement is needed, as updates are tested and validated by Inovium before deployment. The City's IT team may perform a brief validation test post-update.

Inovium provides advance notifications, release notes, and testing guidelines to streamline the update process, before any update is applied. For major updates, Inovium collaborates with City stakeholders to perform pre-release testing in a staging environment, ensuring compatibility and preventing disruptions. Minor updates are typically applied during scheduled maintenance windows with little to no impact on system availability.

- x. Please describe the major/minor upgrade process that is required if the solution requires a client-based installation.

**Response:** Inovium upgrade process is structured and collaborative to ensure the City benefits from both major and minor software enhancements without interrupting operations. Major upgrades include significant new features, architectural improvements, and performance enhancements, while minor updates focus on bug fixes, security patches, and small feature enhancements. Inovium starts with pre-upgrade planning, collaborating with the City's IT team, who prepares the infrastructure based on technical documentation from Inovium. The upgrade is first deployed in a staging environment to validate workflows, integrations, and data accuracy. Issues are resolved before the deployment into production. Once the final deployment occurs in a planned downtime window, Inovium provides on-site and remote support to address immediate issues and ensure the effective use of new features.

For minor updates, Inovium notifies the City for planned updates, provides release notes, and validates updates in a test environment before live deployment with minimal downtime. Our support team escalates the issue and ensures functionality through post-update monitoring. The City's IT team will be responsible for validating workflows and monitoring system performance post-upgrade. Throughout the process, Inovium will maintain thorough documentation, promptly addresses troubleshooting needs, and strictly adheres to timelines to minimize disruptions. This proactive approach enables the City to maximize the benefits of the Infor solution while ensuring uninterrupted operations.



- xi. Are there future costs associated with upgrade processes? For example, costs associated with purchasing licensing for upgrades, professional services costs associated with implementing upgrades, etc.? Proposer to describe the frequency of upgrades and any price ranges for anticipated upgrades.

**Response:** Not for the pure product upgrade. The City might want to see consulting on how to leverage new functionality and Inovium can help with that need.

- xii. What is the role of the City in providing ongoing support and maintenance of the system proposed? How many FTE are typically required to support the system on the client-side, and what tasks are entailed?

**Response:** Infor does not restrict the number of support users. On average, customers have 5 to 8 users with access to the support portal. The customer contact administrator is responsible to set up the users and can decide who gets access to log incidents and who just has access to knowledgebase. Typically the customer sets up key SME's with incident logging security. The number of contacts with incident logging privilege really depends on how many sites the customer has, where they are located globally.

## 1.14 STATUS REPORTING

Proposer to detail their approach to providing status reports throughout the course of the Project. This section should include an example of the recurring status report and identify the expected delivery mechanism that will be used to provide the report to the City.

**Response:** At Inovium, we prioritize clear, consistent, and proactive communication throughout the project lifecycle, ensuring that all stakeholders remain informed through structured status reports that track project progress, risks, and next steps. Throughout the project, Inovium will provide regular weekly status updates to keep the City informed of milestones, risks, and action items, leveraging Confluence (like a SharePoint) for documentation and JIRA boards for task tracking to provide real-time visibility into progress. These updates will be accessible in a shared collaboration space and reviewed during scheduled project status weekly meetings to maintain alignment and address any emerging challenges. Our commitment to transparency and collaboration ensures that the City remains fully engaged and informed, with a structured reporting framework that facilitates proactive issue resolution and ongoing project success.

## 1.15 RESOURCE HOURS

Proposer shall include the proposed resource levels for the City Implementation Project Team and their Project Teams by completing the tables below.

**Table 3-01: Project Team Resource Hours**

### Project Team Resource Hours

**Instructions:** The Proposer is asked to provide the number of resources that will be committed to the Project in terms of number of hours. These numbers should be based on the functionality the City desires, included in the detailed Functional and Technical Requirements (Attachment B).



### Project Team Resource Hours

**Assumptions:** Any assumptions related to the number of Project Team staff for the Proposer or City teams, roles of staff, and duration of involvement used in the development of the resource hour estimates **should be included here**: These hours are estimated based on our experience and may change based on the City's structure.

Functional Area	Project Team	Requirements and Design	Data Conversion	Configuration and Setup	Implementation/Project Management	Testing	Training	Total
<b>Total Hours by Project Task:</b>	City Team	300	200	250	264	650	80	1,744
	Vendor Team	308	312	1492	1330	990	508	4,940

Proposer shall include the anticipated resource hour's levels for the City Implementation Project Team based on typical project role by completing the tables below. Any comments related to the anticipated hours, any phase-specific involvement, or other assumptions should be noted in the Additional Vendor Comments column.

**Table 3-02: Anticipated Hours by Project Role**

Anticipated Hours by Project Role			
City Project Role (e.g., Project Sponsor, Project Manager, Conversion Lead)	Estimated hours per month (ranges are acceptable)	Estimated number of individuals required for role	Additional Vendor Comments
<b>Executive Sponsor</b>	5	1	
<b>Steering Committee</b>	5	TBD	
<b>Project Manager</b>	20	1	
<b>Project Management Team</b>			
<b>Functional Area Lead(s) – Assuming one lead per tab of Attachment B</b>	20	2	
<b>Subject Matter Expert(s) – Note: one SME may serve as SME on two or more modules/functional areas</b>	20	1	Only for period of the functional area they cover.
<b>Integration Lead</b>	80	1	Only during integration work
<b>Data Conversion Lead</b>	80	1	Only during Data Conversion Work

System Administrator	4	1	For Training
Reporting Lead	4	1	
Organizational Change Management Lead	TBD		
Training Lead	TBD		
Other Vendor-Defined Roles (list below)			

Proposer to provide their overall estimated split/division of the work effort as shared between the City and the vendor teams (example: The City owns 20% of the work effort, and the Vendor owns 80% of the work effort) along with any narrative to support this estimate.

**Table 3-03: Anticipated Work Effort Division**

Anticipated Work Effort Division		
	City Project Team	Vendor Project Team
Estimated number of individuals required for Project Team	Typically, 5 resources at any given time.	5+
Approximate Percentage of Work Effort Owned	20-30%	70%
General Comments	City resources will ramp up based on the functional skill set needed at each given point. Each module has specific requirements and the subject matter experts for those modules will be needed.	

## 1.16 IMPLEMENTATION PLAN

Proposer to provide their overall objectives and approach to the City's implementation. Discuss timing as being chronological, in parallel, etc., for all of the modules proposed.

**Response:** Inovium's main goal for the City's deployment is to have a smooth, efficient, and well-coordinated transition to the Infor system with minimal disruption to daily operations. Our structured planning, phased deployment, stakeholder engagement, and rigorous testing ensures the system is implemented successfully, adopted effectively, and optimized for long-term performance. Our implementation methodology ensures all modules are deployed chronologically or in parallel, depending on interdependencies and operational priorities.

We will:

- o Deliver a fully integrated and scalable system that meets the operational needs of the City.
- o Implement industry best practices to enhance efficiency, accuracy, and security.
- o Minimize disruption by following a phased and structured rollout strategy.
- o Ensure user adoption through proper training, support, and change management

### Implementation Approach and Timing

Our implementation approach follows a strategic combination of parallel and chronological deployment to optimize efficiency while reducing risks.

#### **Project Planning and Requirements Gathering** (Chronological Phase)

- o We will conduct kickoff meeting with City stakeholders to determine the scope, timeline, and objective of the project.
- o We will perform business process analysis and planning for system configuration according to the needs of City.

#### **Core System and Foundational Modules** (Parallel Deployment)

- o Inovium configures and deploys foundational modules in parallel, such as payroll, time and attendance, and benefits administration, ensuring consistency across interconnected functionalities.
- o Integration testing is done in parallel to ensure data exchange and system interoperability.

#### **Specialized and Advanced Modules** (Chronological Rollout)

- o Modules that require more customization, such as advanced reporting, analytics, and budgeting, are deployed sequentially after foundational modules are stabilized.
- o This ensures that critical operations are not interrupted while enhancements are gradually introduced.

#### **Testing and User Acceptance** (Parallel Execution)

- o Unit testing, system integration testing (SIT), and user acceptance testing (UAT) are performed in parallel across modules to ensure consistency and functionality.
- o Real-world testing scenarios involving end users validate workflows before go-live.

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**Go-Live and Post-Implementation Support (Phased Rollout)**

- o A controlled go-live process ensures minimal disruption to City operations.
- o Inovium provides hypercare support, system monitoring, and performance optimization to ensure system stability.

Proposer shall submit a Sample Implementation Plan as an Exhibit to Tab 3.

Exhibit submitted Yes X No

**Response: Please refer to Tab 5**

### 1.17 PROJECT MANAGEMENT PROCESS

Proposer to provide their overall approach for managing the City's Project, including the following areas:

- i. **Scope Management:** approach for managing the Project Scope and the process used to request changes to Project Scope. It is the City's desire to use the proposed software system "as is" and, as such, any changes (e.g., customizations or modifications to the software) must be reviewed and approved by the City's Implementation Project Team.

**Response:** Inovium will ensure alignment with the City's objectives by implementing disciplined scope management and minimizing deviations. During the initial phase, we will collaborate with the City's Implementation Project Team to define what the project scope is, including deliverables, timelines, roles, and responsibilities. This scope forms the basis of both planning and execution and will be periodically tracked through project management tools and status meetings. For the City's preference to take the **Infor** software "as is", Inovium will prioritize systems configuration instead of customization to maintain simplicity, support easier upgrades and help reduce complexity. Inovium has a structured change management process for the scope change to the project. Change requests will be submitted in writing with descriptions of the proposed adjustments, rationale, and anticipated benefits. Inovium assesses the impact on timelines, budgets, and resources and shares the findings with the City for review. No changes will proceed without formal approval from the City's team. Approved changes will be documented and integrated into the project plan to ensure transparency and accountability. Maintaining a collaborative and transparent approach, we will create a system that stays on track, meets the needs of the City, and delivers a solution aligned with its objectives. We will implement the project with strict scope control, continuous monitoring, and strong focus on configuration to ensure effective and efficient execution.

- ii. **Schedule Management:** approach for managing the City's Project Schedule and the process used to submit requested changes to the schedule.

**Response:** Inovium uses a structured and proactive approach to scheduling, ensuring the City's project is on track and within established timelines. The process is designed to emphasize transparency, accountability, and collaboration to manage the schedule effectively and make any adjustments that will be required. At the beginning, we will collaborate with the City's Implementation Project Team to build a project schedule that has clear milestones, deliverables,

dependencies, and critical paths. Such a schedule is built using project management tools for better visibility and traceability among all stakeholders. We will conduct regular status meetings to review progress, potential delays, and resource allocation to stay on the timeline.

Inovium follows a formal process in case of any schedule change to ensure the adjustment is handled effectively. The change request should be in writing and explain why the change is proposed, including the possible impact on the project. Inovium does an extensive impact analysis on how the requested change impacts the timeline, deliverables, and resources. The findings will be shared with the City's Implementation Project Team for review and no changes are made without their formal approval. Adjustments to approved schedules are documented and updated in the project management tools, so all stakeholders remain informed of the revised timeline. Our approach to schedule management ensures the City's project moves forward efficiently, where potential risks and delays are proactively addressed to maintain alignment with the goals and expectations of the City.

- iii. **Risk Management:** their approach for documenting Project risks, providing recommendations for mitigating the risk, and how this will be communicated to the City's Implementation Project Team.

**Response:** Inovium takes a proactive approach to risk management, ensuring that potential challenges are identified, documented, and mitigated effectively throughout the project lifecycle. At the project's inception, we will collaborate with the City's Implementation Project Team to develop a comprehensive risk management plan. This plan will include a risk register that captures all identified risks, their potential impact, likelihood, and proposed mitigation strategies. Risks will be categorized by type, such as technical, operational, or schedule-related, to enable targeted responses. We develop risk strategies in collaboration and involve a combination of preventative measures and contingency plans in case the risks do materialize. Our recommendations for risk mitigation are prioritized based on their potential impact on the project, and actions integrated into the project schedule to ensure timely execution. We will hold regular risk review meetings with the City's team to update the risk register, evaluate the effectiveness of mitigation strategies, and identify new risks. We believe that communication is a cornerstone of our risk management approach. All risks, along with their status and mitigation progress, will be shared with the City's Implementation Project Team through regular updates, status reports, and project dashboards. In the event of a critical risk, we promptly escalate the issue to senior stakeholders and recommend immediate action. We will maintain transparency and foster collaboration to ensure that risks are managed proactively, minimizing their impact on the project's success.

- iv. **Quality Management:** approach/policies to assure that all written deliverables have received appropriate reviews for quality before being submitted to the City.

**Response:** Inovium ensures all written deliverables will meet and exceed the City's quality standards through a structured and rigorous quality assurance process. This commitment is attained through a well-defined quality assurance process for documentation that encompasses established policies and industry best practices. All deliverables are subject to a multi-level

review process to ensure their accuracy, completeness, and alignment with the objectives of the project. It starts with initial content creation by subject matter experts followed by peer review for technical accuracy and consistency. Deliverables are then reviewed by a dedicated quality control (QC) team to ensure clarity, adherence to formatting guidelines, and compliance with the City's requirements. The final step is a senior-level review by our project managers or leads to validate the document aligns with project goals and contractual obligations. Any issues identified will be resolved before the delivery is submitted to the City. Throughout the QA process, Inovium uses tools like checklists, templates, and version control systems to keep things in a consistent, traceable way. Deliverables will be submitted to the City, complete with an accompanying cover letter or summary which emphasizes key points and compliance with requirements. With such a rigid quality management approach, we guarantee that written deliverables are free of errors and polished to perfection for the City.

- v. Communication Management:** approach that will be used to provide the City with a detailed communication plan.

**Response:** Inovium approach to communication management ensures there is transparency, clarity, and timely information sharing at all stages of the project lifecycle. We will work with the City's Implementation Project Team to develop a communication plan tailored to the needs of the project. This includes the key objectives of communication, the roles of stakeholders, reporting structures, and communication protocols. Our communication plan is based on a calendar of recurring meetings: weekly status updates, reviews of milestones, and ad-hoc sessions when matters require immediate attention. Every meeting is scheduled with clear agendas, action items, and summaries to ensure all parties are on the same page. Inovium will also provide the City with detailed project dashboards, progress reports, and issue trackers, to give real-time visibility into the status and risks of projects. Inovium uses multiple communication channels such as email updates, video conferencing, and a dedicated project portal for document sharing and collaboration. Key stakeholders will be given direct access to Inovium's project manager and leads to ensure the critical information flows seamlessly. Our open and consistent communication ensures the City is well-informed and empowered to make timely decisions, fostering a successful and collaborative project environment.

- vi. Organizational Change Management:** process, tools, and techniques they will use to manage the people side of change.

**Response:** Inovium employs a structured and tailored Organizational Change Management (OCM) approach to ensure the City's workforce will successfully adapt to new systems, processes, and workflows. Our strategy focuses on managing the people's side of change by addressing resistance, fostering engagement, and building the necessary skills for smooth adoption. The process initiates with a change readiness assessment that helps to determine the key stakeholders, possible resistance areas, and key areas of challenges. We will use stakeholder mapping and impact analysis to understand the role of different people and departments affected by these changes. These analyses will help to design a comprehensive change management plan which includes the communication, training, and engagement strategy required for the City. Inovium will use multiple tools and techniques to effectively



manage the transition. Our communication tools, such as town hall meetings, newsletters, and project dashboards will help stakeholders to understand what's happening on the project, along with the benefits the new system will provide. Training programs will be tailored for the specific needs of different user groups, involving e-learning modules, hands-on workshops, and quick-reference guides to ensure the knowledge is effectively transferred. Feedback mechanisms like survey and focus group will be implemented to gather input proactively and identify concerns. Our post-implementation support includes coaching, help desk services, and continuous learning opportunities will enable City workers to adapt change with minimal resistance. With sound planning, effective communication, and targeted workforce training, we will inspire the staff to accept the changes needed for the program's success.

**vii. System Interface Plan:** approach and process that will be used to perform the City desired interfaces.

**Response:** Inovium's approach to perform the City's desired interfaces is structured to ensure seamless integration between the proposed system and the City's existing applications. We design our process to provide reliable, scalable, and secure interfaces that support real-time and batch data exchange. Our implementation plan will be tailored to meet the City's specific requirements while maintaining flexibility for future needs. We begin the process with a comprehensive interface requirement gathering phase, during which we will collaborate with the City's technical team to identify all necessary integrations. This includes documenting data sources, exchange formats, transfer schedules, and security protocols. We will create detailed interface design documents that serve as the blueprint for development, ensuring alignment with the City's objectives.

Inovium uses its powerful middleware platform, **Infor OS**, to make it easier to develop and deploy interfaces. It accelerates integration and reduces custom development by using pre-built APIs, connectors, and data transformation tools. In cases where interfaces demand custom solutions, we build them to industry standards, so they remain compatible and scalable in the future. We believe that comprehensive testing is part of interface plan. Interfaces are first deployed in a staging environment where end-to-end testing is conducted with high rigor on data accuracy, performance, and security. The City's team will actively be involved in the testing phase to ensure all interfaces meet operational needs. Upon successful validation, interfaces are deployed to the production environment with minimal disruption. Our post-deployment provides ongoing monitoring and support to ensure the reliability and performance of interfaces. Regular updates will adapt the system changes or evolving requirements. By following this structured approach, Inovium ensures the City's desired interfaces will be implemented efficiently, with seamless data flow across all systems.

**viii. Resource Management Plan:** approach to resource management and managing resource allocation for the City and vendor teams.

**Response:** Inovium's approach to resource management ensures the City and vendor team resources are effectively allocated and utilized throughout the lifecycle of a project. It further ensures collaboration, minimizes resource constraints, and allows for timely delivery of projects



without compromising quality. At the outset, Inovium develops a comprehensive resource plan in coordination with the City's project leadership. This plan identifies key roles, responsibilities, and resource requirements for each phase of the project, including requirements gathering, configuration, testing, and training. Our resource plan includes a detailed timeline with milestones to align resource allocation with critical deliverables and dependencies.

Inovium employs project management tools to track resource availability and utilization, ensuring both City and vendor teams are optimally engaged without overburdening the individual or group. Weekly status meetings are conducted to assess resource performance and address any potential bottlenecks or adjustments required in resource allocation. Resource management for the team of City emphasizes clear expectations and usage of staff time without waste. Inovium will ensure the City is satisfied by involving City employees only during key project activities, such as UAT, decision-making sessions, or training workshops. Vendor will allocate the subject matter experts and technical specialists according to the project phases, especially at the critical periods during go-live and post-implementation. Through this proactive communication, monitoring resource use, and the timely solution of problems, Inovium ensures that allocation properly utilizes resources for those involved in the project, from project initiation to completion.

## Tab 4 – Key Proposed Personnel and Team Organization

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### 1.18 ORGANIZATIONAL CHART

The City anticipates that any vendor staff assigned to the Project will remain assigned to the Project, unless the City deems the services to not meet expectations at which point the Contractor and the City will work together to remedy such non-conforming services. Proposer to identify the approach to assignment and (as necessary) By following this structured approach, of vendor staff during the implementation process.

**Response:** Inovium is committed to ensuring the vendor staff assigned to the project will remain consistent, highly qualified, and aligned with the City's needs throughout the implementation process. Our approach prioritizes stability, expertise, and clear communication to foster seamless collaboration and maintain high-quality performance. Here is our approach for staffing assignment and retention.

**Staff Assignment:** At the start of the project, Inovium will assign vendor staff based on their expertise, experience, and alignment with the project's functional and technical requirements. The SMEs, technical specialists, and a dedicated project manager are in this team who will be responsible for being the primary point of contact for the City. We will clearly define roles for each member with respective responsibilities to assure accountability and to share the objective. Inovium ensures the personnel assigned to the critical roles will hold the necessary certification, experience, and knowledge of the **Infor** system and the operational environment of the City.

**Staff Retention and Continuity:** Inovium ensures the staff of the vendor is assigned to the project from initiation to completion. To this end, we take the following measures:

- **Resource Planning:** Inovium will plan resource availability in advance to ensure the assigned staff remains committed to the project throughout the entire duration.
- **Engagement and Development:** Inovium will engage the teams through professional development, clear communication, and positive work environment to reduces the risks of turnover.
- **Risk Mitigation:** We will identify potential risks due to unavailability of resources in advance and makes contingency plans in case unforeseen circumstances occur.

**Process for Non-Conformance:** In case a City staff member is not performing at the expected standards, Inovium collaborates with the City to identify the area of concern and implement corrective action. Our step-by-step handling of nonconformity follows a structured procedure and will be clearly communicated:

- **Performance Review.** Inovium and the City will work together in the review of performance concerns, finding their root causes, and determining the specific corrective measures needed.
- **Remediation:** Inovium will provide tailored training, coaching, or auxiliary support to address performance gaps and improve service quality, to ensure sustained improvement for the staff member involved with the project.

**Replacement Process:** Inovium ensures any necessary replacement staff are promptly identified, with qualifications that meet or exceed those of the original team member. Our replacement process will includes:

- Thorough knowledge transfer to the new staff member.
- Minimal disruption to project timelines and deliverables.
- Full transparency with the City on the replacement timeline and what is being done.

**Ongoing Communication and Collaboration:** Inovium will maintain regular communication with the City throughout the implementation process to ensure the City will be informed of staff performance and resource allocation. Our regular status meetings and performance reviews provide a forum for addressing concerns promptly and collaboratively. Our structured approach to the assignment, retention, and replacement of staff helps to ensure the City receives a constant high-quality service from the beginning of the project to its end. This commitment to excellence supports the successful implementation of the system and further enhances the partnership between Inovium and the City.

- i. Describe the proposed approach to staffing for the implementation process. Will the City be working with separate resources on the Proposer team based on functional area (e.g., payroll, time/attendance) or will the City work with a more limited number of resources that may provide cross-functional expertise?

**Response:** Inovium's approach is designed to provide a collaborative, responsive, and well-organized implementation process, enabling the City to achieve its project goals successfully. Our approach for staffing the implementation process is structured to give the City a balanced and efficient team structure that will work in both seamless collaboration with domain-specific expertise and effective project delivery. Our proposed team will include functional area specialists as well as cross-functional experts who will meet the diverse needs of the implementation process while streamlining communication and decision-making. We will assign dedicated specialists for key functional areas like payroll, time and attendance, and benefits administration with in-depth knowledge of each domain. In the case of these SMEs, they have extensive experience in configuring and implementing the **Infor** software for their areas to ensure there will be an alignment with the City's requirements and operational workflows. Overseeing various functional areas, our project manager, technical leaders, and quality assurance specialists manage interdependencies, maintain a consistent implementation strategy, and guarantee alignment across modules. These experts promote information exchange, expedite problem solving, and offer a comprehensive viewpoint on system functionality and performance. Inovium guarantees personnel flexibility during implementation,

modifying workforce allocation in response to workload demands and project milestones. This hybrid staffing model will ensure the City benefits from specialized expertise for complex functional needs while maintaining efficiency and cohesion through cross-functional leadership.

- a. Does your firm provide certification(s) for staff based on knowledge/achievement in understanding the software solution? If so, will all staff assigned to the implementation be certified in the software product(s) proposed?

**Response:** Yes, Inovium recommends Infor's Campus classware based on role for software certifications.

- ii. Proposer to submit as an Exhibit to Tab 4, an Organizational Chart including subcontractors and reporting structure of the entire team proposed to work on the City's project.

Exhibit submitted Yes X, please see below N

**Inovium Team:**

**Scrum Master (Project Manager)**

- Primary contact for clients
- Manages Jira board
- Manages project scope
- Tracks hours burn, milestone dates, and projected overages
- Enforces rigor on Agile process
- Coordinates effort with Infor processes, including support tickets, access and provisioning, defect resolution, and escalations
- Manage enhancements/extension contracts (CR). Coordinates with Solution Architect for sizing and with Sales for commercials

**Solution Architect**

- Escalation point for technical and functional approaches
- Provides best practices in the industry and product
- Coding/configure the product for high complexity or high complexity solutions
- Effort sizing and timeline estimates for new projects, upgrades, enhancements, and CRs to existing implementations
- Escalation for in-scope vs out-of-scope requirements
- Mentor consultants on product features
- Keep updated on the latest features of the product

**Application Consultant**

- Configures, develops, and unit tests product.
- Creates and refines Jira cards
- Author BDDs and supporting documentation
- Coordinate testing efforts - SIT, UAT, and parallel testing
- Extracts and analyzes data to investigate issues and determine best practices.
- Primary contact for client SMEs

**Migration Manager (optional)**

- Executes migrations to promote configurations to production instances
- Enforces rigor on migration logs / packages
- May involve using the technical tool (DMT) or manually reconfiguration directly in production instance

**Client Team:**

**Project Lead**

- Manages internal City of Surprise resources and deliverables
- Manages Internal Communications
- Ensures Project tasks assigned to City of Surprise resources are completed.

**Subject Matter Experts (Likely Multiple People)**

- Provides expertise on policies and procedures
- Defines and Approves Scope Detail
- Provides Validation of functionality at the end of each sprint

**Technical Lead**

- Provides system integration support
- Provides technical requirements and facilitates technical work in connectivity, security and system set up on internal City of Surprise systems

**Trainer/Enablement Resource**

- Attends train the trainer sessions
- Help to define and validate Job Aids
- Provides End User training to City of Surprise employees

Inovium typically recommends Job Aids and recommends that customers leverage Infor Campus for ongoing e-learning. Inovium can provide recorded training sessions for new hires if needed for a fee.

## 1.19 PROJECT TEAM RESUMES (PROPOSER)

- As an Exhibit to Tab 4, resumes shall be provided for the implementation team, as well as additional personnel involved in the proposed project governance structure, including any partners/subcontractors. Resumes shall be specific to the actual personnel to be assigned to this Project for all primary roles (e.g., Project Manager, Conversion Lead). Resumes to include listing of past software implementation projects and certifications held for each team member.

Exhibit submitted Yes ☒ No ☐

**Response:** We have provided resumes as exhibit entries under the “Proposal Exhibits” section, titled “Exhibits to Tab 4: Key Proposed Personnel and Team Organization.”

- ii. Summary of Project Team: Proposer shall complete the table on the following page listing a summary of the Project Team Members including any partners/subcontractors.

**Table 4-01: Proposer Project Team Members**

Proposer Project Team Members						
Name	Title	Role on Proposed Project Team (e.g., PM)	Years of Relevant Experience	Years with firm	Number of implementations completed within past five years	Identify Scope of Services/Tasks this individual will be working on for the City
Steve Ahn	Chief Architect	Solutions Architecture	20+	7	10+	Solution Design (WFM)
Mario Da Roza	Head of Scrum Management	Project Management	20+	5	8	Project Management Office
Dan Miller	Solutions Architect	Solution Architecture	20+	1	10	Solutions Design (HR/Pay)
Michael Anderson	Head of Consulting	Consulting	15+	1		Head of Consulting



## Tab 5 – Project Schedule

### 1.20 PROJECT SCHEDULE

- i. Proposer shall submit a proposed Project Schedule with the major milestones, activities, and timing of deliverables for the Scope of Work described in the RFP. In addition, the response should reflect Project predecessors, successors, and dependencies.
- The City requests that the sample Project Schedule be in a Gantt chart format.
  - The City would expect implementation to begin in August 2025.
  - Proposer to submit as an Exhibit, a sample Project Schedule and insert in Tab 5

City of Surprise	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35
Week																									
WFM Pilot																									
01 Kickoff, Provisioning, Access																									
02 Discovery, Planning																									
03 Build Sprint 1 - Data extract/Interfaces, SSO, Exploratory																									
04 Build Sprint 2, 3, 4 - Configuration: Core Elements, Pay Rules, Accruals, Integrations, Fields, Security, Alerts, SSP, Two level Timesheet Approval	X	X	X	X	X	X	X																		
05 Build Sprint 5 - Configuration MVS Shift Bidding								X	X	X															
06 Build Sprint 6 - Configuration MVS Shift Bidding cont'd, Migration											X	X	X												
07 Sprint 7 - Parallel, Performance, SIT														X	X	X									
08 Sprint 8 - Breakfix and Acceptance																	X	X	X						
09 Sprint 9 - Rehearsal, Go-live planning, OCM, handoff planning																	X	X	X	X	X				
10 Go-live																						X			
11 Hypercare																							X	X	
Inovium Resource Plan																									
Scrum Master / Lead (TBD)	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	8	8	8	
Solution Architect (TBD)	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	12	12	12	12	12
Application Consultant #1 (TBD)	24	24	24	24	24	24	24	24	24	24	24	16	16	16	16	16	16	16	16	16	16	24	24	24	16
Application Consultant #2 (TBD)	24	24	24	24	24	24	24	24	24	24	24	16	16	16	16	16	16	16	16	16	16	24	24	24	16
Planned Hours	60	60	60	60	60	60	60	60	60	60	44	44	44	44	44	44	44	44	44	44	48	48	68	68	52
Running Total (Hours)	482	542	602	662	722	782	842	902	962	1022	1066	1110	1154	1198	1242	1286	1330	1374	1418	1466	1514	1582	1650	1702	1702

Exhibit submitted Yes, please see below X No

### Sample Project Schedule

## Sample HCM Phase

HRT Phase 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52						
Discovery	X	X	X																																																							
Human Resources and Personnel Management				X	X	X	X	X	X																																																	
Recruitment										X	X	X	X	X	X	X	X	X	X	X	X	X																																				
Learning Management				X	X	X	X	X	X	X	X	X																																														
Performance Management													X	X	X	X	X	X	X	X																																						
Employee Relations				X	X	X	X	X	X																																																	
Risk Management																																																										
Compensation Enhancements																X	X	X																																								
Reporting and Analytics																						X	X	X	X	X	X																															
Interfaces																						X	X	X	X	X	X																															
Data Conversion																																																										
CRP Testing																						X	X	X	X	X	X																															
SIT Testing																																																										
Refinement																																																										
UAT Testing																																																										
Go-Live Preparation																																																										
Cutover																																																										
Go-Live																																																										
Hypercare																																																										
Inovium Resource Plan																																																										
Scrum Master / Lead (TBD)	10	10	10	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4					
Solution Architect (TBD)	20	20	20	16	16	16	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	12	12	12	12	12	12	12	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8			
Application Consultant #1 (TBD)	8	8	8	16	16	16	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	12	12	12	12	12	12	12	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
Application Consultant #2 (TBD)	8	8	8	16	16	16	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	12	12	12	12	12	12	12	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
Application Consultant #3 (TBD)	8	8	8	16	16	16	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	12	12	12	12	12	12	12	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
Planned Hours	54	54	54	68	68	68	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48	48			
Running Total (Hours)	54	108	162	230	298	366	438	510	582	654	726	798	870	942	1014	1086	1158	1230	1302	1374	1426	1478	1530	1582	1634	1686	1734	1782	1830	1880	1930	2010	2070	2110	2190	2250	2310	2370	2430	2490	2550	2610	2670	2730	2790	2854	2918	2982	3046	3110	3174	3238						

## 1.21 PROJECT DELIVERABLES, MILESTONES, AND PAYMENT APPLICATIONS

- Proposer to include a list of deliverables and milestones of the Project and should describe exactly how and what will be provided to meet the needs of the City.

**Response:** Inovium is committed to delivering high-quality, timely, and comprehensive deliverables and milestones throughout the project lifecycle to meet the City's needs. The below table includes the list of deliverables and milestones designed to ensure alignment with project objectives, maintain transparency, and achieve successful implementation of the **Infor** software system.

Deliverable/Milestone	Description	Delivery Timeline
<b>Project Kickoff Meeting Agenda and Materials</b>	Detailed agenda and presentation outlining objectives, scope, roles, timeline, and next steps.	At project initiation.
<b>Project Plan</b>	Comprehensive document covering scope, timeline, milestones, resources, and risk management.	Within two weeks of the kickoff meeting.
<b>Requirements Documentation</b>	Finalized document capturing all functional and technical requirements, workflows, and data migration needs.	After requirements-gathering workshops.
<b>System Configuration Design Document</b>	Document detailing Infor system configuration based on the City's requirements and objectives.	Before the configuration phase begins.
<b>Data Migration Plan</b>	Plan to outline ETL processes, including data validation and reconciliation strategies.	Before data migration begins.
<b>Training Materials and User Guides</b>	Role-specific guides and self-paced training resources to support end-user adoption.	During the training phase.
<b>Testing Plans and Reports</b>	Test scripts and reports for SIT and UAT, including results and issue resolution logs.	At the completion of each testing phase.

<b>Go-Live Checklist and Support Plan</b>	Pre-launch checklist and detailed support plan for go-live and post-implementation phases.	Before go-live.
<b>Post-Implementation Report</b>	Final report summarizing outcomes, lessons learned, and recommendations for improvement.	Within one month of project completion.
<b>Project Initiation</b>	Completion of the kickoff meeting and approval of the project plan.	At project initiation.
<b>Requirements Finalization</b>	Approval of the required documentation by the City.	After requirements workshops.
<b>System Configuration</b>	Completion of system configuration and initial validation.	During the configuration phase.
<b>Data Migration</b>	Successful migration of Legacy, Tyler Munis, and workday data into the Infor system.	During the data migration phase.
<b>Testing Completion</b>	Successful SIT and UAT, with all critical issues resolved.	At the completion of testing phases.
<b>Training Completion</b>	Delivery of training sessions and materials to City staff.	During the training phase.
<b>Go-Live</b>	Deployment of the Infor system in the production environment.	At go-live.
<b>Post-Implementation Review</b>	Delivery of the post-implementation report and closeout of the project.	After project completion.

- ii. Proposer to submit their payment schedule, tied to the listed deliverables and milestones for review by the City, as an exhibit to Tab 5. This schedule shall be consistent with the terms provided in Attachment D of the RFP (Cost Narrative) and should not include the dollar amounts for payments, but rather the events that would trigger payments. Notation should be made as to the payment structure for services (e.g., fixed fee, time and materials).

Exhibit submitted Yes No X

**Response:** Inovium builds project milestones and deliverables collaboratively with our customers, and this would typically be completed as part of the SOW and project Kickoff/Discovery. Inovium is proposing a Time and Materials-based project, and invoicing would occur each month due to Net 30 from receipt. Inovium is not opposed to a fixed bid project approach once we can confirm detailed requirements and City resource availability.

## 1.22 PROJECT SCHEDULE QUESTIONS

**Table 5-01: Project Schedule Questions**

1. Based on current obligations, what is the earliest you can begin implementation after contract signing?	Based on our current obligations, we can begin implementation within one month of contract signing. Our team is prepared to allocate resources efficiently to ensure a seamless and timely start to the project. Please let us know if you have any specific scheduling needs, and we will do our best to accommodate them.
2. What activities would the Proposer expect to occur within the first 60 days of contract signing?	Within the first 60 days of contract signing, Inovium anticipates a structured and efficient implementation process. The engagement will begin with a project kickoff, provisioning of system access, and initial configurations. Following this, discovery and planning sessions will be conducted to align on requirements and establish a clear implementation roadmap. The first build sprint will focus on data extraction, interface setup, and core system configurations, ensuring foundational elements are in place. Subsequent build sprints will continue refining system configurations, conducting iterative testing, and validating integrations. As the process advances, further configurations, including Multi-View Scheduling (MVS) and Shift Planning, will be implemented, preparing the system for user testing and validation. This phased approach ensures a seamless transition into the next stages of deployment.
3. How long does the typical implementation of the product being proposed take for an organization of similar size to the City?	The typical implementation of the proposed product for an organization of similar size to the City generally takes approximately 8 to 9 months. This timeline allows for a structured approach, including discovery and planning, system configuration, iterative build sprints, testing, user training, and deployment to ensure a seamless transition and successful adoption. The exact duration may vary based on specific requirements, resource availability, and integration complexity.
4. What special considerations are there related to the timing of go-live activities? Does it vary based on functionality (e.g., benefits go-live being aligned with open enrollment, payroll with calendar year or quarter)?	At Inovium, we understand that go-live timing is critical to a smooth transition and minimal disruption. Our approach aligns with key business cycles to ensure seamless adoption. Payroll is typically scheduled with a new year, quarter, or pay cycle for compliance and reconciliation. Benefits go-live aligns with open enrollment, while time and attendance launch with a new pay period for accuracy. Workforce scheduling often rolls out in phases to match operational needs. Our TACK agile deployment methodology proactively addresses timing challenges, working closely with stakeholders to ensure a successful transition.

## 1.23 PROJECTED GO-LIVE DATES

The City anticipates that implementation activities would begin in August 2025. The City would like to target January 2027 as a potential go-live date for human resources and payroll modules. The City follows a July 1–June 30 fiscal year. Proposers are encouraged to propose phasing and timelines that best align with the Proposer's implementation approach.

**Response:** Typically, go-live dates are driven by the core dates inside of the City such as when the financial year is, the benefits enrollment period is, and the annual performance review dates. Those are just examples, and we are flexible with dates. Any dates below would be speculative prior to discussing key events with the City that might affect certain go-live dates. Assuming the city can provide the resources to perform the project, we would have no issue being fully live by January 2027.

**Table 5-02: Projected Go-Live Dates**

Phase	Functional Areas	Potential Start Date	Target Go-Live Date
I	Payroll and Core HR Go-live	August 2025	July 1, 2026
II	Workforce Management Go-Live	August 2025	July 1, 2026
III	Talent Management Modules	August 2025	Various Go-Live Dates per Module

## Tab 6 – System and Application Architecture

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### 1.24 GENERAL OVERVIEW

Proposer to provide a description of the proposed system and application architecture for the proposed application.

**Response:** Designed to provide unmatched user experience, Infor solutions deliver industry-specific capabilities without extensive customizations or integrations. Our solutions combine the Infor cloud platform built on infrastructure services from AWS and Infor OS, enabling cloud applications to work collaboratively with each other and with legacy software.

By moving critical business applications to Infor, the City can take advantage of automatic upgrades that deliver the latest advances in enterprise functionality. As users become more productive, technology teams can spend less time managing software deployments and customizations—and everyone can focus on more strategic initiatives.

In summary, we will enable the City to keep applications current and connected, leverage powerful functionality, and optimize critical business processes.

#### **Consolidate, Simplify and Standardize with Infor WFM**

Infor's solutions are leading-edge, comprehensive, and modern solutions that help organizations of all sizes strategically align labor management to corporate strategy – to increase workforce efficiency, employee productivity, and engagement.

Infor provides a complete set of integrated modules, built on a digital platform, consisting of forecasting, scheduling, time and attendance, employee self-service, compliance, and performance.

Designed with a pure web-based architecture that uses J2EE (Java 2 Enterprise Edition), Infor gives you flexibility in your technology choices. Infor Workforce Management is easy to administer and support and requires minimal hardware. The solution features single-server multilingual management designed to streamline processes and improve labor optimization and service levels to reduce cost.

The Service Orient Architecture (SOA) design of Infor applications optimizes your flexibility to grow and expand your requirement set over the coming years while optimizing your choices and reducing the total cost of ownership (TCO).

The entire Infor solution set is also hosted withing Amazon's AWS cloud hosting environment.

## 1.25 SYSTEM AND APPLICATION ARCHITECTURE QUESTIONS

**Table 6-01: System and Application Architecture Questions**

1. What is the source language(s) of the product?	Java for the server platform and HTML for the user experience
2. How many environments are available with your proposed solution at no additional cost (e.g., test, training, production)?	The standard offering provides one production and two non-production environments. It will be a common infrastructure with the same version of software and code base.
3. Describe how often major and minor software updates are provided, as well as the level of City resources required for a major update and the level of resources required for a minor update.	In the cloud, customers receive automated service releases on a regular monthly cadence. These updates provide fixes, security updates, and date sensitive updates so that you retain compliance with statutory requirements and regulations in the countries that you operate in. Innovation releases occur twice a year in (April and October) and delivers new features and capability enhancements. This schedule is designed to result in minimal disruption to operations, as customers no longer need to invest substantial resources in planning and completing the updates. Infor communicates to enrolled customers via a notification, when such updates are available. Customers can subscribe to notifications in the CloudSuite Self-Service Portal. The streamlined release process can be a significant benefit, as it allows customers to stay current on the latest version of a particular product with minimal manual effort.
4. Please describe the major/minor upgrade process that is required if the solution requires a client-based installation.	Not applicable to the SaaS solution proposed.
5. List all browsers that are certified for use with the application and describe any required browser add-ons, function enablement, etc.	The recommended browser is Chrome for Windows and Mac users. If Chrome is not an option for your organization, then an alternative recommendation would be Edge for Windows and Safari for Mac.
6. The underlying architecture of the application design is important to the City. Please describe your system architecture	Infor's SaaS multi-tenant cloud utilizes large clusters of network, computer and storage resources (farms) to deliver CloudSuite application functionality to our customers. These farms of resources are located in Amazon Web Services (AWS) regions, which are composed of multiple independent data centers (AWS Availability Zones, or AZs). Deploying Cloud applications across multiple AZs



<p>model and explain the capabilities and features of this model that led to your use of it in developing this system.</p>	<p>within a Region provides a reliable, scalable and secure environment for Infor customers' applications and data. Infor refers to the unique combination of Cloud applications and customer data and configuration as a "tenant", and each tenant is logically and completely isolated from other tenants. This isolation and the allocation of multiple tenants per customer allows for testing, training and configuration management activities outside of the production system while simultaneously ensuring that production and non-production code levels are the same at all times. Access to the application is via the public Internet over HTTPS (TLS 1.2) encrypted connections.</p>
<p>7. Please describe how data privacy and security compliance is supported within your proposed software solution. Is the system HIPAA compliant?</p>	<p>Infor's proposed software solution supports data privacy and security compliance through several mechanisms. From a data privacy perspective, Infor products provide tools to allow customer's compliance using GDPR/CCPA as the standard while still complying with other industry regulations. Infor will make available to customer, in a manner consistent with the functionality of the Subscription Services and Infor's role as a processor of Personal Data of data subjects, the ability to fulfil data subject requests to exercise their rights under the GDPR. If Infor receives a request from customer's data subject to exercise a right under the GDPR in connection with a subscription service for which Infor is a data processor, Infor will redirect the data subject to make its request directly to the customer. Customer will be responsible for responding to any such request including by using the functionality of the subscription services. Infor shall comply with reasonable requests by customer to assist with customer's response to such a data subject request.</p> <p>Infor's internal privacy and data protection policies are confidential to Infor and are not shared externally. These internal policies cover topics such as third-party requests for data, incident response, business continuity, responsible data handling, and more. Infor's public facing privacy policy is available at <a href="http://www.infor.com/about/privacy">www.infor.com/about/privacy</a>.</p> <p>From a security perspective, the proposed Infor SaaS solution utilizes procedures that are in accordance with industry standard guidelines which may include standards from the National Institute of Standards and Technology (NIST) or the Information Security Management Standard (ISMS) family of standards (ISO/IEC 27000 standard series) or a combination of such guidelines or other equivalent successor industry standard information security frameworks. Infor does not claim specific compliance to one framework; however, the Infor SaaS solution does harness multiple security control points of multiple frameworks. On an annual basis, the Infor SaaS environment</p>

	<p>undergoes a third-party audit for these security control points, generating a SOC report which is made available to customers through the Infor Support Portal. Infor's Information Security Office (ISO) has established an Information Security Management System (ISMS) policy.</p> <p>Infor leverages a shared security model, where the security of the application is distributed. The customer maintains responsibility for the first line, which is user security and the role that a user has, allowing them access through a role-based model to the field level. Infor maintains network and operations security to ensure that the data in transit and at rest is secure. Software developed in support of both full version and patch/enhancement is secure and does not introduce vulnerabilities, and that appropriate tools are used to harden the environment against threat. Infor leverages the services of Amazon Web Services (AWS) to provide the infrastructure in which the fully managed solution is hosted. Infor leverages the AWS security tools as the first layer of defense against unauthorized access. Infor Cloud Operations and Infor Security Office (ISO) then deploy host-based malware and IDS/IPS protection to provide an additional layer of protection. The Threat and Vulnerability Management Program implemented by Infor's ISO in conjunction with Infor's Development teams and Cloud Operations teams, is based on the premise of a Secure Development Framework. This framework starts with detailed scanning and assessment of the environment. Infor ISO performs the following security scans to identify OWASP security threats: source-code scanning, vulnerability scanning, penetration testing, and system hardening scans. The security items identified in the scans are triaged and the proper remediations are added to the development process for resolution (for application related issues) or provided to the Cloud Operations team (for infrastructure related issues). The timing of the implementation of these remediations depend on the complexity of each item.</p> <p>For a list of applications which hold a HIPAA attestation, please see <a href="http://trust.infor.com">trust.infor.com</a>.</p>
<p>8. Describe your approach to ensure scalability of the product. This includes transaction growth, upgrades, and replacements of components of the architecture, technology, and application.</p>	<p>The Infor solution is a fully managed solution. Infor will provide the appropriate configuration to fulfill the needs of the customer, based on the number of licensees agreed upon. Infor ensures the SaaS platform is sufficiently resourced to support the number of licensed users and within the reasonable operating limits of the application.</p> <p>Infor Cloud deployment models leverage the auto-scaling capabilities of the underlying AWS infrastructure to dynamically adjust to varying workloads. This capability ensures that our</p>

	solutions can scale virtually infinitely to ensure optimal performance for our customers.
9. List all hardware/operating system/database platforms upon which the product is supported. Provide specifications in terms of processors, processor speed, memory requirements, and other sizing and capacity factors to assist the City in budgeting for and acquiring hardware. List which industry standard benchmarks or guidelines measures are used to establish this recommendation.	Not applicable to the proposed SaaS solutions.
10. Describe the design philosophy of your application. Include in your response the degree to which there is a common design philosophy across all modules, common programming languages and tools, and the extent of shared software code across all applications.	Infor WFM is designed with a user-centric philosophy, focusing on usability, scalability, and integration. This approach ensures a consistent design across all modules, emphasizing a seamless user experience. The software utilizes a common programming language in Java. Code sharing is a key aspect, with shared components, libraries, and APIs that promote efficiency and maintain uniformity across the platform.

## Tab 7 – Data Conversion Plan Inovium

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### 1.26 APPROACH

Proposer to detail their approach to developing and implementing the data conversion plan, and what processes will be undertaken by the Proposer's project team to convert existing data, as well as to interface with identified source systems. Include methods of quality control and testing that will be utilized specifically to data conversion.

**Response:** Inovium will collaborate closely with the City to formulate and implement a data conversion strategy. Infor includes formats to facilitate conversions but we also work with client to make sure we convert data that makes sense to be migrated vs migrating data that may be better served archived. Key focus areas include:

**Data Conversion Plan:** Inovium starts by creating a data conversion plan with the City's project team. This includes evaluating existing data sources, formats, and systems to evaluate critical datasets to migrate. Our process includes mapping legacy system fields to the data structure of the **Infor** system and documenting dependencies to ensure completeness. Following this, we conduct a scope definition to clearly outline the datasets, file formats, and systems to be converted and integrated.

**Data Conversion Process:** Inovium will initiate the data conversion process by extracting data using secure, automated tools that efficiently migrate your data into the new platform. This approach ensures secure and accurate data extraction, while minimizing manual effort and reducing the risk of errors. We import data into the staging environment, where it will be well-checked and tested before being uploaded to the live system.

**Quality Control:** Inovium ensures the highest quality of data integrity through strict quality control measures. Our automated checks detect anomalies, duplicates, and formatting errors, which ensure consistency in data. Any change in the ETL process is tracked through audit trails to ensure full accountability. We apply sampling techniques to validate randomly selected migrated data for accuracy to reduce the chances of hidden issues. After deployment, we continue to monitor the system to ensure data integrity and rectify the issues that arise in the initial use of the system.

Describe your organization's recommended approach toward retention of legacy data. Please describe what options are available, and supported, within your proposed solution. Also, please provide any relevant references of organizations that have successfully addressed legacy data with your solution.

**Response:** In most cases, we recommend archiving data off to a data warehouse for reporting purposes. Typically, older data does not always migrate well in a future state configuration. Our goal will be to identify critical data to migrate and then archive the remaining data in a reporting database should it be needed in the future.

## References and Successful Implementation

**Response:** Inovium's successful implementations include City of Corpus Christi, City of Carrollton, Rosen Hotels, Kohler Co, DirectTV, Warner Brothers, and MV Transit. Typically, all the implementations involve data migration and/or conversion. The way we move the data and what we move are typically dictated by the quality of the data and what is needed. Inovium would build each use case as part of the project and work with the City to define the data migrations for each module. An example might be migrating accruals but not punch history for Time and Attendance. Typically punch history has no value and is cumbersome to migrate.

### 1.27 ROLES AND RESPONSIBILITIES

The Awarded Proposer will assist the City in the conversion of both commercially available software-based data, and any applicable data maintained in Microsoft Excel and Access, in to the new system as further described in the sources identified in Attachment B, Data Conversion tab.

It is expected that the City will be responsible for data extraction from current systems and data scrubbing and that the Awarded Proposer shall be responsible for overall data conversion coordination, definition of file layouts, and data import and validation into the new system(s). Awarded Proposer should plan to have converted data ready for the User Acceptance Testing (UAT) phase of the Project.

As part of the resulting Project, the Awarded Proposer shall develop and provide a detailed Data Conversion Plan that describes how files will be converted to the proposed system (e.g., through software conversion aids/utility programs or special programs that must be written, the actual conversion procedures). A conversion schedule should identify planned conversion steps, estimated hours, and what resources will be required (by the City or Awarded Proposer) for all pertinent legacy data.

- A. Proposer to confirm their proposal includes providing the services identified in this Section (Item II Roles and Responsibilities) and provide any additional services that are also provided as part of your Data Conversion Plan/Program.

**Response:** Yes, this is the case. The plan will be delivered as part of the BDD design documents. Given the scope of all the data to be converted is not fully stated, we'll look to define the final scope prior to executing an SOW.

- B. Proposer to specify or provide the format in which legacy system data should be extracted and provided to the Proposer for conversion activities.

**Response:** Inovium requires the extraction and submission of legacy system data in structured formats to ensure accuracy, consistency, and seamless integration into the Infor system. The preferred data formats for extraction include CSV (Comma-Separated Values), Excel (XLS/XLSX), XML (Extensible Markup Language), JSON (JavaScript Object Notation),

and SQL database dumps. These formats will allow for efficient data transformation, validation, and mapping to the Infor system's schema.

Semi-structured forms, including fixed-length text files or legacy system reports (PDF/Word), will be taken into consideration if structured formats are not available; nevertheless, more processing could be necessary to transform them into a structured format. Prior to submission, the extracted data will be cleaned to eliminate formatting errors, duplicates, and inconsistencies to guarantee data integrity.

The extracted data will be securely transferred using encrypted file transfer protocols (SFTP), secure cloud storage, or API-based extraction pipelines to maintain confidentiality and protect sensitive information. Following receipt, Inovium carries out a comprehensive validation, mapping, and transformation procedure. We will conduct several test migrations to confirm accuracy and completeness. This structured approach ensures a smooth data conversion process, minimizing risks and disruptions while enabling a seamless transition to the system.

## 1.28 RESPONSIBILITY OF DATA CONVERSION ACTIVITIES

**Table 7-01: Definition of Roles**

Role	Summary
Lead	The party is ultimately responsible for the activity.
Assist	The party provides active assistance for the activity.
Participate	The party provides passive assistance for the activity.
Share	Both parties share equal responsibility for the activity.
None	The party has no role in the activity.

**Table 7-02: Summary of Response Indicators**

Indicator	Response	Description
<b>S</b>	Supports	The Proposal supports the prescribed responsibility roles with its proposed data conversion methodology and approach.
<b>C</b>	Conflict	The Proposal has a conflict with the prescribed responsibility roles and proposes alternate responsibility in its proposed data conversion methodology and approach.

**Table 7-03: Responsibility of Deliverables**

No	Data Conversion Activity	Proposer Role	City Role	Response	Other Comments
1	Perform Conversion Analysis of Existing Legacy Data	Participate	Lead	S	

No	Data Conversion Activity	Proposer Role	City Role	Response	Other Comments
2	Perform Crosswalk Development of Legacy Data From Legacy System to New System	Participate	Lead	S	
3	Provide Conversion Data	None	Lead	S	
4	Provide File Layouts/Data Maps of Existing System	None	Lead	S	
5	Proof Data Provided	Assist	Lead	S	
6	Analysis of Data to be Converted	Lead	Assist	S	
7	Developing and Testing Conversions	Lead	None	S	
8	Review and Correct Errors	Share	Share	S	
9	Load Converted Data Into Training Database	Lead	Participate	S	
10	Confirmation of Converted Data in Training Database	Participate	Lead	S	
11	Approval/Signoff of Converted Data in Training Database	Lead	Participate	S	
12	Load Converted Data Into Live Database	Lead	Participate	S	
13	Confirmation of Converted Data Into Live Database	Share	Share	S	
14	Approval/Signoff of Converted Data in Live Database	Lead	Participate	S	
15	Other:				



## Tab 8 – Security and Software Hosting

### 1.29 GENERAL OVERVIEW

Proposer to provide a description of the proposed application security features/functionality as well as the underlying technology used to support hosting and access to the software by clients.

**Response:** Inovium's **Infor** application is designed with robust security features and functionality to protect sensitive data and ensure secure access for clients. Our approach to security is rooted in industry best practices and compliance with regulatory standards, offering a secure and reliable environment for hosting and accessing the software. We apply leading edge security characteristics and robust hosting security to prevent hacking and cyber-attacks, ensuring the data and infrastructure of City are secure and resilient.

#### **Infor Security features and functionality:**

- **FedRamp:** Infor's FedRAMP certification is a key differentiator and offers confident, independent confirmation that Infor's cloud security solutions meet high industry standards. FedRAMP is a government-wide program that provides a standardized approach to security assessment, authorization and continuous monitoring for cloud products and services. Infor is among a select group of vendors that went through rigorous testing to offer the gold standard of data security certifications to customers. Infor reached FedRAMP authorization after extensive review of Infor's security posture. Infor's Solutions are deployed in the AWS (Amazon Web Services) Gov Cloud.
- **Data Encryption:** Data are protected with end-to-end encryption with the highest encryption algorithms (AES-256). Because of this, personal data, for example information about employees and payroll data, are protected while transferred and stored.
- **Role-Based Access Control (RBAC):** The system includes RBAC to ensure the users have access only to the data and features relevant to their roles. Permissions are granularly managed, and access policies are configurable to meet the City's specific requirements.
- **Multi-Factor Authentication (MFA):** To enhance login security, our system supports MFA, requiring users to verify their identity through multiple authentication methods.
- **Audit Trails:** It keeps a detailed record of all user activities, including access to data, changes, and administrative activities. These logs help in maintaining accountability and supporting compliance audits.
- **Compliance Alignment:** The application is compliant with regulatory standards such as GDPR, HIPAA, and SOC 2. This ensures the data privacy and security measures follow legal and industry requirements.

#### **Underlying Technology**

- **Hosted environment.** Infor leverages AWS from Amazon Web Services, which serves to provide excellent availability, has good disaster recoverability, and inherent

redundancy features. In addition to this strong security framework presented by AWS, application-level securities of Infor enhance the total package.

- **API integration:** APIs provided for integration, for data access are protected through OAuth 2.0 and Secure token techniques that only system-authorized services will be engaged in accessing.
- **Middleware Support:** Infor OS middleware supports secure data exchange and workflow automation. Middleware features include data transformation, encryption, and endpoint validation to ensure secure integration.
- **Mobile Security:** The application supports mobile access with enterprise-grade security, including device-level encryption, remote wipe capabilities, and secure session management.

**Continuous Monitoring and Updates:** Infor employs continuous monitoring to detect and address potential vulnerabilities. Automated tools and threat intelligence are used to identify risks in real time, while regular updates and patches address emerging security threats. The platform's architecture is designed to support seamless updates, minimizing disruptions during security enhancements.

### 1.30 SECURITY QUESTIONS

Proposer to respond to the following questions related to system security and access controls.

**Table 8-01: Security Questions**

Question	Response
1. Is Active Directory integration and/or single sign-on supported? Please provide applicable diagrams and/or details to substantiate the level of integration and compliance with published internet standards (i.e., LDAP and DNS).	Infor provides integration to the customer's existing authentication infrastructure via ADFS / SAML 2.0. Access to the system is restricted by individual user access IDs and passwords; each user has a unique login/password combination.  Infor's proposed solution supports enterprise single-sign-on through SAML-based federation with the customer's Identity Provider (IdP). The customer IdP must be SAML 2.0-compliant.
2. Proposer shall detail the ability of the proposed system(s) to integrate with Active Directory Domain Services implemented in accordance with published internet standards such as Lightweight Directory Access Protocol (LDAP) and Domain Name System (DNS). If such integration is not offered, Proposer shall explain the identify management solution that is provided.	Infor provides integration to the customer's existing authentication infrastructure via ADFS / SAML 2.0. Access to the system is restricted by individual user access IDs and passwords; each user has a unique login/password combination.  Infor's proposed solution supports enterprise single-sign-on through SAML-based federation with the customer's Identity Provider (IdP). The customer IdP must be SAML 2.0-compliant.

Question	Response
3. Describe how the SaaS application/service provides two-way user and group synchronization with Active Directory (AD). (e.g., As users and groups are added to and removed from AD, these changes are reflected in the SaaS applications). Would the City AD be able to push, and the SaaS applications able to receive, user profiles and groups?	Application-level access is controlled via the customer's existing authentication infrastructure via ADFS/SAML 2.0 integration. Customer IdP should be SAML 2.0 complaint. For users, Infor offers a multitude of profiles for our customers. Administration accounts are set up by Infor for the benefit of customers' users to perform functions necessary, with the appropriate role access. Access to the data by a company's employee will always be controlled by the company. They will have the ability to assign roles and responsibilities to each of your users. The creation of each user account is designed with a "least privileged" starting point. Meaning that the company will have the ability to assign access and privileges on a user-by-user basis.
4. When a user is added to AD, are the proposed solutions automatically provisioned and, conversely, when a user is removed from AD, access is automatically revoked?	Infor's proposed solution includes integration with AD for automated user provisioning and de-provisioning. This capability ensures that when a user is added to AD, the solutions automatically provision the necessary access permissions, allowing for seamless integration and reducing manual administrative tasks. Likewise, when a user is removed from AD, access to the solutions is automatically revoked, maintaining security and ensuring that only active users have access to the system.
5. Are users able to sign on to the Windows network once, and then easily gain access to the proposed applications without having to enter an additional set of credentials?	Through single-sign-on, users will be able to sign on to the Windows network once and easily gain access to the applications without having to enter an additional set of credentials.
6. Will Proposer require remote access to City systems/network to provide support/management of the solution either during implementation or post go-live? If yes, please describe in detail what type of access is required.	Customers can greatly facilitate incident resolution by providing Infor Support Analysts with remote access to Component Systems. Providing remote access is a standard contractual requirement. The Infor Support Analyst will require the same clearance level as your internal staff. However, Infor will ask for permission prior to connecting to your system. Customers will also be expected to participate while remote access is available to the Infor Support Analyst.

Question	Response
7. If any access, remote or physical, is required for accessing City's systems/network, will Proposer agree to reviewing and having applicable staff consent to follow applicable City Security Policies?	Yes, please see the previous response regarding remote access.
8. Will Proposer staff resources be accessing the City systems/network remotely from outside the United States? If yes, please describe in detail the reasoning and how security will be managed.	<p>Customers can greatly facilitate incident resolution by providing Infor Support Analysts with remote access to Component Systems. Providing remote access is a standard contractual requirement. The Infor Support Analyst will require the same clearance level as your internal staff. However, remote access is on as needed and on a permission basis prior to connecting to your system. Customers will also be expected to participate while remote access is available to the Infor Support Analyst.</p> <p>Infor has support staff in many countries. Infor has dedicated support staff for each product line.</p> <p>Some of Infor Global Support center locations include:</p> <p><b>Americas</b> – Alpharetta, GA; San Mateo, CA; Chicago, IL; Framingham, MA; Ann Arbor &amp; Grand Rapids, MI; Hampton, NH; West Fargo, ND; Columbus, OH; Malvern, PA; East Greenwich, RI; Greenville, SC; Dallas, TX; Buenos Aires, Argentina; Sao Paulo, Brazil; and Mexico City, Mexico.</p>
<p>9. Describe in detail the password requirements and account management standards for the system.</p> <ul style="list-style-type: none"> <li>- Can complex password requirements be enforced on the software along with aging requirements if SSO is not available?</li> <li>- Can accounts be locked-out automatically after ## failed login attempts?</li> <li>- Are session timeouts enforced in the system?</li> </ul>	<p>Infor provides integration to the customer's existing authentication infrastructure via ADFS / SAML 2.0. Access to the system is restricted by individual user access IDs and passwords; each user has a unique login/password combination.</p> <p>Infor's proposed solution supports enterprise single-sign-on through SAML-based federation with the customer's Identity Provider (IdP). The customer IdP must be SAML 2.0-compliant.</p> <p>Application access (authentication and authorization) is as per the identity provider (IdP) policies set by licensee. Applications are configured to leverage the Licensee's corporate IdP, with respective password policies (e.g. password</p>

Question	Response
	<p>complexity, maximum and minimum age, etc.) which are extended SaaS applications.</p> <p>Infor changes the lockout to match the customer's existing lockout requirements.</p> <p>Customer and administrative sessions employ auto-logout functionality. For customer sessions, the time for this logout functionality is configurable by the customer.</p>

## 1.31 SOFTWARE HOSTING QUESTIONS

Proposer to respond to the following questions regarding their software hosting platform proposed for the City.

**Table 8-02: Software Hosting Questions**

Question	Response
1. Where are the data center and storage facilities?	US-East-1-PPD (Virginia) is the allocated region for the City of Surprise.
2. What is the total number of active clients currently served by hosted/SaaS solutions provided by your company?	At this point in the selection process, Infor policy precludes the provision of specific product and client base numbers. We can say that Infor is a vital part of our overall product offering and receives a significant portion of support resources, including access to development commitment. Should need additional confirmation around the viability of the solution proposed and where it falls within the Infor fold for this engagement, Infor will work with during the selection process to offer any additional assurances required.
3. How many years has your company provided hosted/SaaS solutions?	Infor CloudSuite Public Sector has been available and provisioned for customers since September 2016.
4. How are hosted/SaaS software applications deployed for use by numerous customers?	<p>Infor's SaaS multi-tenant cloud utilizes large clusters of network, computer and storage resources (farms) to deliver CloudSuite application functionality to our customers. These farms of resources are located in Amazon Web Services (AWS) regions, which are composed of multiple independent data centers (AWS Availability Zones, or AZs). Deploying Cloud applications across multiple AZs within a region provides a reliable, scalable and secure environment for Infor customers' applications and data. Infor refers to the unique combination of Cloud applications and customer data and configuration as a "tenant," and each tenant is logically and completely isolated from other tenants. This isolation and the allocation of multiple tenants per customer allows for testing, training, and configuration management activities outside of the production system while simultaneously ensuring that production and non-production code levels are the same at all times. Access to the application is via the public Internet over HTTPS (TLS 1.2) encrypted connections.</p> <p>Infor's SaaS multi-tenant cloud utilizes AWS private subnets, called Virtual Private Clouds (VPC) where VPCs are deployed along with shared infrastructure to serve various applications/Cloud Suites across Infor customers.</p> <p>In the multi-tenant cloud environment, each customer is provisioned with its own independent database within a cluster. Customers are provided with a unique configured database accessed with a unique TenantID. Databases are also encrypted at the volume level using AES-256.</p>


Question	Response
5. What availability and response time do you guarantee?	<p>Infor commits to an application availability SLA of 99.7% for our Cloud applications excluding scheduled maintenance.</p> <p>Application response times can vary widely depending on the application function being performed and the volume of data the function is expected to process/analyze. Infor monitors application response times from the point when a request is received until a response is returned and uses this data to help understand where bottlenecks and other issues may occur if not addressed. Infor does not publish or commit to application response time SLAs due to the many variables outside of our control which can affect timings.</p> <p>Bandwidth into and out of the Infor Cloud is, for practical purposes, unlimited and is managed and monitored through our partnership with Amazon Web Services (AWS). As with all Cloud-delivered services, the customer is responsible for providing connectivity to the Internet for itself and its authorized users and for monitoring the availability of bandwidth and adjusting as necessary. Infor resources can assist the customer in estimating bandwidth usage based on our experience with similar customers.</p> <p>For bandwidth requirements, Infor recommends a minimum bandwidth of 70kb/s per active power user, and a minimum total throughput of 512kb/s.</p>
6. How many instances of unplanned outages have any of your customers experienced within the past five years? Describe the nature of any such outages, including the mitigating steps that have been established to minimize repeat outages.  - What has been the duration and scope of such unplanned outages?	<p>Infor has successfully maintained an uptime of 99.8%+ for past 12 months. Moreover, as the outages are very specific to the tenants and the respective customers, the information on history of outages is not shared to other clients.</p> <p>Infor commits to an application availability SLA of 99.7% for our Cloud applications excluding scheduled maintenance.</p>
7. What are the standard relief schedules for unplanned system downtime/outages?	<p>For multi-tenant applications, Infor has successfully maintained an uptime of 99.8%+ for past 12 months. Moreover, as the outages are very specific to the tenants and the respective customers, the information on history of outages is not shared to other clients.</p>



Question	Response
- In how many instances has your firm had to pay client relief for unplanned outages?	Infor provides a Service Level Agreement in sales contracts. Details related to penalties for non-performance will be covered in the contract between Infor and the client.
8. What is your process for notification of standard maintenance and downtime? What is your process for notification of unplanned outages and downtime?	<p>The Subscription Services are subject to regularly scheduled monthly maintenance windows for which customers will be given at least seventy-two (72) hours advance notice as always described in the SaaS delivery guide (available through Concierge). An annual maintenance window calendar is accessible through Infor Concierge. In standard operating conditions, each instance of a scheduled maintenance window is estimated to extend up to six (6) hours. While most of Infor's maintenance can be completed during regularly scheduled maintenance windows, in some urgent situations, maintenance must be performed outside of the scheduled maintenance windows (critical maintenance) to help maintain the integrity and security of the Subscription Services. In such cases, Infor will provide customer's subscribed contact (through the CloudSuite Portal) as much advance notice of the critical maintenance as is technically feasible</p> <p>Automated notifications from the CloudSuite portal are sent out to customers in the event of outage or performance degradation.</p> <p>The Infor CloudSuite portal provides advance notification for planned outages and also for unplanned outages/performance degradations. Furthermore, <a href="https://status.infor.com/">https://status.infor.com/</a> is also available to indicate the current status of the application.</p>
9. What data security and system redundancy capabilities are available at Proposer's data center and storage facilities?	<p>Infor leverages the services of Amazon Web Services (AWS) to provide the infrastructure in which the fully managed solution is hosted. AWS maintains data centers in geographically disperse locations for redundancy. Infor will work with the customer to select an existing multi-tenant farm that best fits their needs.</p> <p>Infor has partnered with Amazon Web Services (AWS) to provide data center hosting services. AWS provides multiple Availability Zones (AZ) in the same region, which are in essence separate data centers across various geographic regions. These multiple AZs support high-availability, fault tolerance, and seamless failover capabilities. Example: should AZ1 go down, AZ2 and AZ3 would pick up the load. At the same time, a new instance will be created to ensure that there are 3 AZs again.</p>
10. Will data be encrypted at rest, and in transit?	Infor SaaS solutions use industry standard encryption methods while transmitting or storing Licensee data; (1) In Transit the data is encrypted

Question	Response
Please explain any applicable protocols.	with TLS 1.2 and (2) while data at rest within SaaS the storage is encrypted with AES 256 bit.
11. How many years has your company provided SaaS solutions?	Infor CloudSuite Public Sector has been available and provisioned for customers since September 2016.
12. What is the total number of active clients currently utilizing the proposed software as a SaaS deployment provided by your company?	At this point in the selection process, Infor policy precludes the provision of specific products and client base numbers. We can say that Infor is a vital part of our overall product offering and receives a significant portion of support resources, including access to development commitment. Should need additional confirmation around the viability of the solution proposed and where it falls within the Infor fold for this engagement, Infor will work with during the selection process to offer any additional assurances required.
13. Provide relevant documentation related to any recent certifications pertaining to the Proposer's hosting technical and operation capabilities or that of their subcontracted provider for these services.	<p>Infor's Information Security Office (ISO) has established an Information Security Management System (ISMS), inclusive of security policies that provide guidelines towards the people, processes, and technology necessary to protect the confidentiality, integrity, and availability of data. The Infor CloudSuite Public Sector has applications that are in scope for Infor's ISO 27001 certificate which can be viewed via <a href="https://trust.infor.com">https://trust.infor.com</a>.</p> <p>Infor MT SaaS applications undergo SSAE18-based assessment and third-party generated audit reports are published (SOC 1 and SOC 2 Reports). These are available to existing customers through Concierge and can be made available to prospective customers with a signed NDA.</p>
14. Provide detailed information on the way(s) in which the City will access the software if deployed in a SaaS or hosted environment. Such information should include how the software is accessed when on or off the City network, as well as any additional hardware/software that may be required for accessing the software.	All access to Infor's Cloud applications is over the public Internet, leveraging encrypted connections (HTTPS over TLS) via a compatible web browser. No unencrypted communication is ever allowed into or out of the Infor Cloud.

Question	Response
15. How is data stored? Would City data be physically or logically segmented from other client data?	<p>Infor's SaaS multi-tenant cloud utilizes AWS private subnets, called Virtual Private Clouds (VPC) where VPCs are deployed along with shared infrastructure to serve various applications/CloudSuites across Infor clients.</p> <p>In the MT cloud environment, each tenant is provisioned with its own independent database within a cluster. Tenants are provisioned with a unique configured database accessed with a unique Tenant-ID. Databases are also encrypted at the volume level using AES-256.</p>
16. Please describe the database storage capacity of the proposed solution. <ul style="list-style-type: none"> <li>i. Are there limits on the amount of data that can be stored in the proposed solution?</li> <li>ii. If applicable, what tiers of storage are offered in the hosted/SaaS environment?</li> </ul>	<p>There will be no limits regarding scalability. The only limit is that Infor cloud solutions include two terabytes of storage at no additional charge. Additional storage may be purchased by a client at any time.</p> <p>2TB is the cumulative storage provided; all products and environments included.</p>
17. What disaster recovery services are provided under your standard hosting agreement? If not standard, is there a separate agreement/cost associated with disaster recovery?	<p>Infor maintains Business Continuity Plan (BCP) / Disaster Recovery (DR) documentation for our Cloud applications. BCP/DR outlines processes and procedures to be followed in the event our Cloud applications must be recovered from backup as the result of a catastrophic failure. Infor Cloud Operations personnel review and update the DR documentation on a regular basis, and testing is conducted on reference application deployments on an annual basis at a minimum.</p> <p>Recovery Point Objective: The Recovery Point Objective ("RPO") describes the acceptable amount of data loss measured in time and is the point in time to which data will be recovered. The service levels include an RPO of up to one (1) hour for MT products proposed on this solution.</p> <p>Recovery Time Objective: The Recovery Time Objective ("RTO") is the duration of time within which Subscription Services will be restored after declaration of a disaster. The Subscription Services will be operational within an RTO of twelve (12) hours for MT products proposed in this solution.</p> <p>It is included as a standard within the proposed offering.</p>

Question	Response																																				
18. Please describe the anticipated cost savings or cost avoidance (e.g., reduced hardware needs, maintaining failover sites) that may be realized through selecting a SaaS deployment model. Specific figures from past projects that can be substantiated may be included.	<p>Utilizing Infor's SaaS Solution, hosted by AWS, will result in lower hardware and server needs for Surprise. Cost savings and value can be measured by reduced downtime and increased security.</p> <div><h3>Which to Choose?</h3><p>■ Own/Manage   ■ Cloud</p><table><thead><tr><th>Fixed Costs</th><th>On Premise</th><th>Hosted</th><th>Infor Cloud</th></tr></thead><tbody><tr><td>Hardware</td><td>Applications</td><td>Applications</td><td>Applications</td></tr><tr><td>Infrastructure</td><td>Data</td><td>Data</td><td>Data</td></tr><tr><td>IT Resources</td><td>Middleware</td><td>Middleware</td><td>Middleware</td></tr><tr><td>Application Maintenance</td><td>O/S</td><td>O/S</td><td>O/S</td></tr><tr><td>License Fee</td><td>Servers</td><td>Servers</td><td>Servers</td></tr><tr><td></td><td>Storage</td><td>Storage</td><td>Storage</td></tr><tr><td></td><td>Networking</td><td>Networking</td><td>Networking</td></tr><tr><td></td><td></td><td></td><td>Infor CloudSuite Subscription Fee</td></tr></tbody></table></div> <p>Forester Research - "...survey respondents estimated that they spend an average 72% of the money in their budgets .. supporting ongoing operations and maintenance, while only 28% of the money goes toward new projects."</p>	Fixed Costs	On Premise	Hosted	Infor Cloud	Hardware	Applications	Applications	Applications	Infrastructure	Data	Data	Data	IT Resources	Middleware	Middleware	Middleware	Application Maintenance	O/S	O/S	O/S	License Fee	Servers	Servers	Servers		Storage	Storage	Storage		Networking	Networking	Networking				Infor CloudSuite Subscription Fee
Fixed Costs	On Premise	Hosted	Infor Cloud																																		
Hardware	Applications	Applications	Applications																																		
Infrastructure	Data	Data	Data																																		
IT Resources	Middleware	Middleware	Middleware																																		
Application Maintenance	O/S	O/S	O/S																																		
License Fee	Servers	Servers	Servers																																		
	Storage	Storage	Storage																																		
	Networking	Networking	Networking																																		
			Infor CloudSuite Subscription Fee																																		

## Tab 9 – Testing & Quality Assurance Plan

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### 1.32 APPROACH

Describe your standard approach to testing and quality assurance.

**Response:** Inovium’s testing and quality assurance process is comprehensive and systematic and built off strong Infor capabilities to ensure the proposed solution meets the City’s quality standards for performance, functionality and reliability. We design our methodology to identify and correct defects early in the implementation cycle, thereby minimizing risk and ensuring a smooth rollout for the City. Here is our approach for testing and quality assurance:

#### Testing Phases

- **Unit Testing:** We test Individual modules in isolation to ensure they work as expected according to design specifications. During this stage, developers rely on automated tools to catch and fix bugs.
- **Integration Testing:** We test how modules and systems interact, taking into account data flows, API integrations, and workflows.
- **System Testing:** We test the complete system in a controlled environment, evaluating performance, scalability, security, and compliance to meet operational requirements.
- **Integration Testing:** We validate the seamless interaction between modules and systems, focusing on data flows, API integrations, and workflows.
- **System Testing:** We test the complete system in a controlled environment, evaluating performance, scalability, security, and compliance to meet operational requirements.
- **User Acceptance Testing (UAT):** We will work closely with City end-users to validate the system meets their needs and operational requirements through real-use scenarios, ensuring it is ready for deployment.

**Quality Assurance Practices:** Inovium implements rigorous quality assurance (QA) practices to ensure the highest standards of software reliability and efficiency. We begin by defining clear objectives and establishing the overall testing strategy. This includes identifying testing requirements, setting realistic timelines, and determining the tools and resources needed to achieve the desired results. We tailor our approach to each project, ensuring alignment with the client's specifications and goals.

**Communication and Collaboration:** Inovium ensures consistent communication with the City’s Implementation Project Team during all testing phases. We will conduct regular updates, test results, and feedback sessions to maintain alignment and proactively address concerns.

**Post-Deployment Validation:** After the go-live, Inovium will perform a post-deployment validation by tracking system performance and solving unforeseen issues that will arise. We will perform extra QA cycles to ensure the system is stable and error-free in the production environment.

## 1.33 SAMPLE PLAN

Submit a Sample Testing and Quality Assurance Plan that would be very similar to the plan utilized for the City's Project. Proposer to submit as an Exhibit a Sample Plan in Tab 9.

Exhibit submitted No

**Response:** Inovium does not typically develop a test plan for our customers given we follow SCRUM agile as a methodology testing policies vary greatly by customer. We typically create design documents that articulate every use case for our customers and how the system is supposed to interact to support those use cases. The example below is the format we use and we work with the City to map out all of your critical business processes so that you can validate functionality is working and performing as you expect.

Example Screen Shot of Behavioral Driven Design Document:

### NON-EXEMPT TEMP/PT - LUNCH DEDUCTION ON AN OFF SHIFT



Owned by [David Ho \(Unlicensed\)](#) \*\*\*  
 May 21, 2024 • 3 people viewed • [Legacy editor](#)

#### Quicklinks

- [Scenario 1.1: No Auto Deduction](#)
- [Scenario 2.1: 30-minute Auto Deduction](#)
- [Scenario 2.2: 30-minute Auto Deduction on a 6-hour working shift.](#)
- [Scenario 2.3: No 30-minute Auto Deduction on a 5 hours and 45 minutes working shift](#)
- [Scenario 3.1: 60-minute Auto Deduction](#)
- [Scenario 3.2: 60-minute Auto Deduction on a 6-hour working shift.](#)
- [Scenario 3.3: No 60-minute Auto Deduction on a 5 hours and 45 minutes working shift](#)

#### User Story

As a **non-exempt employee** assigned to the **TEMP/PT Calc Group**, I need the system to deduct either **0, 30, or 60 minutes for lunch on a non-scheduled workday (Shift = OFF)**, after I've **worked more than 6 hours**. This ensures that the lunch deduction for non-scheduled days accurately reflects my working hours. Scenarios below apply to TEMP/PT calc group employees where the employee will be assigned to a shift pattern to indicate their meal duration if a meal should be auto-deducted.

TEMP/PT 30 - 30 minute meal

TEMP/PT 60 - 60 minute meal

No Schedule - no meal deduction

#### Background

**Given** that I am a non-exempt TEMP/PT employee, who is punching in and out and working on an unscheduled day (OFF shift).

#### Policy

- When the Break Length is 0 in the shift pattern, do not auto deduct a MEAL.
- When the Break Length is 30 in the shift pattern. auto deduct 30 minutes of MEAL after working 6 hours.



## Policy

- When the Break Length is 0 in the shift pattern, do not auto deduct a MEAL.
- When the Break Length is 30 in the shift pattern, auto deduct 30 minutes of MEAL after working 6 hours.
- When the Break Length is 60 in the shift pattern, auto deduct 60 minutes of MEAL after working 6 hours.

### Scenario 1.1: No Auto Deduction

**Given** that I am an employee in a TEMP/PT calc group, with an assigned Shift Pattern and a Break Length of 0 or no shift pattern assigned at all, when I am working more than 6 hours (punching in and out) on an OFF day, my MEAL auto-deduction is zero.

**When** my clocks are:

Day of the Week	Scheduled	Shift	Clock Type	Clocks
Mon	8:00	8:00 - 16:00	ON	8:00a
			OFF	4:00p
Tue	8:00	8:00 - 16:00	ON	8:00a
			OFF	4:00p
Wed	8:00	8:00 - 16:00	ON	8:00a
			OFF	4:00p
Thu	8:00	8:00 - 16:00	ON	8:00a
			OFF	4:00p
Fri	8:00	8:00 - 16:00	ON	8:00a
			OFF	4:00p



## 1.34 PLAN DETAILS

Awarded Proposer will be responsible to provide a Testing and Quality Assurance Plan that describes all phases of testing that may be used: unit, system, interface, integration, regression, parallel, and user acceptance testing (UAT). It is the City's expectation that the Testing and Quality Assurance Plan govern all phases of the Project, and that the Proposer will also provide assistance during each testing phase involving City users. The Awarded Proposer will develop the initial UAT plan, provide templates and guidance for developing test scripts, and provide onsite support during UAT. The Awarded Proposer will also provide a plan for stress testing the system, which will occur during or after UAT. Proposer to confirm their proposal includes providing the services identified in this Section (Item III Plan Details) and provide any additional services that are also provided as part of your Testing and Quality Assurance Plan not listed.

**Response:** Inovium follows SCRUM Agile as a project methodology. We do not typically create Testing and Quality plans for our customers, given this is a commercially off the shelf product without customizations.



## 1.35 LEVELS OF SUPPORT

What levels of support will be provided by the Proposer during the City testing phases (e.g., parallel and UAT)? Will Proposer resources be onsite during certain testing phases? Are varying service levels offered for testing support?

**Response:** Inovium is committed to extensive and flexible support during parallel testing and other City testing activities, including User Acceptance Testing (UAT). Here are the levels of support and services that we will provide:

**Parallel Testing:** During the parallel testing, Inovium will assign technical specialists to assist the City in running both the legacy and new systems side-by-side to ensure data consistency and output accuracy between the two systems. We will provide test scripts and reconciliation tools to help the City identify discrepancies and validate results. Any defects and inconsistencies found in this phase are logged, analyzed, and resolved quickly in collaboration with the City's team. This will help to ensure a smooth transition and instills confidence in the new system before go-live.

**User Acceptance Testing (UAT):** We will actively participate in UAT to ensure the City can validate the system's functionality against operational requirements. Our team will provide BDDs so that the City can design and perform the UAT testing in real-world scenarios. In the testing phase, we will be troubleshooting issues, gathering feedback from users, and refining the system as needed. With a dedicated test coordinator, communication between the City and Inovium ensures smooth execution of UAT and alignment with the City's goals.

## V. PARALLEL TESTING

Describe the proposed approach to payroll parallel testing, including the number of anticipated parallel tests which would be performed for payroll processes.

**Response:** Inovium's parallel testing ensures the payroll processing in the Infor system is accurate, reliable, and ready for go-live. Each payroll process stage is specifically designed to check calculations, detect discrepancies, and facilitate payroll operations during the pre-go-live phase. Here is our approach for payroll parallel testing:

- **Planning and Preparation:** Inovium will work closely with the City to define the scope of payroll parallel testing. This includes identification of all pay groups, employee types, and special payroll scenarios, such as overtime, benefits, and deductions, that need to be tested. This planning phase ensures a clear roadmap, and shared expectations exist for the parallel testing process.
- **Parallel Testing Execution:** During the testing phase, we perform parallel payroll runs using identical data for the same pay period in both the legacy system and the Infor system to ensure accuracy and consistency. Inovium recommends two to three parallel test cycles be performed to ensure the system is adequately tested. Confirmation of the outputs of both systems, including gross pay, taxes, and deductions and net pay, is confirmed as being accurate. Third-party system integrations with benefits provider and tax agencies are validated to ensure data flow is smooth across these platforms. This

phase will ensure the payroll functionality in the new system provides a similar accuracy as the legacy system.

- **Analysis and Reconciliation:** Inovium produces high-level reconciliation reports to compare the outputs generated by both systems, indicating the differences after every test cycle. All errors encountered, including calculation errors or gaps in configurations, are formally logged, analyzed, and addressed. Our team will work together with City payroll staff to resolve issues identified during testing. Adjustments to system configurations and workflows will help to eliminate problems. After adjustments are made, we will conduct retesting to ensure the issues are resolved and the system is fully reliable.
- **Post-Testing Review:** Inovium will conduct a review of results with the payroll team of the City. Such a review helps to ensure the discrepancies have been addressed, and the system is now configured to satisfy the operational requirements of the City. Our post-testing review will serve as an avenue to determine whether the system is ready for the live payroll process, hence bringing confidence in the performance and reliability of the system.

## Tab 10 – Training Plan

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### 1.36 PROPOSED TRAINING APPROACH/STRATEGY

Proposer to describe the proposed approach to training users of the system, including the frequency of training, timing in the overall sequence of the implementation, as well as training resources/materials that will be provided to trainees.

**Response:** Inovium is proposing to train the trainer for this implementation. Infor also provides a certification curriculum on the Infor Campus site. For end users, we recommend Job Aids as a mechanism for enablement based on real-world tasks the employee would need to perform.

Proposer to provide their approach to the training plan and what makes their training plan successful and effective for system implementations. Include your approach to when and why you choose to use on-site training versus a webinar or a train-the-trainer format.

**Response:** Inovium provides training via Train the Trainer and job aids for the workforce. During the project, we design Use Case documents called BDDs, which are adapted during the project to the final new system use cases. The training team with the City would be enabled continuously throughout the project using these documents and the City's processes and use cases in the system.

Proposer to detail the knowledge transfer strategy proposed to prepare the City staff to maintain the system after it is placed into production.

**Response:** Inovium trains nominated City team leads or SMEs in advanced system operations and maintenance. These persons will become internal trainers and knowledge resources for other staff, creating a sustainable, scalable support structure.

Proposer to detail the approach to conducting training using webinar (e.g., GoToMeeting, Zoom, Teams, Skype), including how Proposer staff will monitor staff comprehension and, if applicable, provide assistance to trainees on navigation through the system.

**Response:** Inovium is able to provide training via Teams meetings but recommends Infor's Infor Campus solution to take online courseware they have t

Proposer to identify the requested analysis/training room environment requirements and any other requirements related to the training facility/room/equipment. Requirements may include any presentation equipment, whiteboards, seating style, number of computers, printers, and other amenities needed to support on-site implementation activities.

**Response:** Inovium suggests a remote training environment will be well-equipped to ensure cost-effective training for the City's staff.

### 1.37 TRAINING PLAN AND RESOURCE HOURS

Proposer to provide a chart detailing the proposed training plan and resource hours allocated for the City's project. A *sample format of the chart* is detailed below. Cost Worksheet provided in Attachment C to coincide with the hours and resources proposed.

**Table 10-01: Training Plan Legend**

Legend	
User Types	Core Project Team, End Users, Technology Users, Other (please describe)
Training Model	Train-the-Trainer, Proposer-Provided Training, Other (please describe)
Class Format	On-Site Classroom, Webinar/Video Conference, Web Training Service, Other (please describe)

**Table 10-02: Training Plan**

Training topic/course	Functional Module Covered (please specify per proposed module, such as benefits, payroll, etc.)	Type of City users to attend	General summary of number of sessions offered of this course	Maximum class size	Format for the class	Training data that will be used for this topic/course (live, sandbox, etc.)
HR Talent	Getting Started with HR Talent - Product Knowledge	Trainer/Project Team	7	Varies	eLearning	Sandbox as needed
HR Talent	Project Implementation Team - Product Knowledge	Trainer/Project Team	4	Varies	eLearning	Sandbox as needed
HR Talent	Recruiting Team - Product Knowledge	Trainer/Project Team	8	Varies	eLearning	Sandbox as needed
HR Talent	Benefits Team - Product Knowledge	Trainer/Project Team	6	Varies	eLearning	Sandbox as needed
HR Talent	Employee Relations Team - Product Knowledge	Trainer/Project Team	8	Varies	eLearning	Sandbox as needed

Training topic/course	Functional Module Covered (please specify per proposed module, such as benefits, payroll, etc.)	Type of City users to attend	General summary of number of sessions offered of this course	Maximum class size	Format for the class	Training data that will be used for this topic/course (live, sandbox, etc.)
HR Talent	Getting Started with HR Talent - Product Knowledge	Trainer/Project Team	7	Varies	eLearning	Sandbox as needed
HR Talent	Project Implementation Team - Product Knowledge	Trainer/Project Team	4	Varies	eLearning	Sandbox as needed
HR Talent	Absence Management Team - Product Knowledge	Trainer/Project Team	6	Varies	eLearning	Sandbox as needed
HR Talent	Compensation Team - Product Knowledge	Trainer/Project Team	8	Varies	eLearning	Sandbox as needed
HR Talent	Payroll Team - Product Knowledge	Trainer/Project Team	10	Varies	eLearning	Sandbox as needed
Workforce Management	Administering Time/Attendance	Trainer/Project Team	11	Varies	eLearning	Sandbox as needed
Workforce Management	Using Time/Attendance	Trainer/Project Team	25	Varies	eLearning	Sandbox as needed

Propose to submit as an Exhibit a Sample Training Plan and insert in Tab 10.

Exhibit submitted **Yes**, See above No

## 1.38 TRAINING COORDINATION

Proposer to detail the roles and responsibilities for the training effort, including but not limited to:

**Table 10-03: Training Roles and Responsibilities**

Role/Responsibility	Identify if Role/Responsibility is City/Proposer (including any Subcontractors)/Shared
Training Coordination/Scheduling	City
Training Curriculum/Material Development	City and Infor
Training Instruction/Delivery	City
Other:	

## 1.39 SYSTEM DOCUMENTATION

Proposer to provide a detailed description of system documentation and resources that will be included as part of the implementation including, but not limited to, detailed system user manuals, "Quick Reference" guides, etc. as available. Proposer to itemize optional items on Attachment C. Proposer to check off in the table below all that are available and included as part of the RFP response.

**Table 10-04: System Documentation**

Type of Documentation	Included in Scope of Proposal to the City?	Description/Explanation/Optional
Quick Reference Guides	Included In Scope	Inovium includes limited creation of Job Aids as quick reference material for Employees, Managers, and Administrators.
Online Support	Included In Scope	Infor provides an online support portal calls Concierge
Help Desk Support	Included In Scope	Infor provides a support ticketing solution for customer administrators.
User Group Community Resources	Included In Scope	Infor maintains a list of User Groups globally and many of these user groups also host their own annual events
Annual User Conferences	Included In Scope	Infor has several annual customer events and one national event.
Videos	Included In Scope	Infor campus does include training videos as part of their training content.
Custom User Guides/Manuals	Included In Scope	Customer user documentation creation is not bid as part of this proposal.

Type of Documentation	Included in Scope of Proposal to the City?	Description/Explanation/Optional
Other:		



## Tab 11 – References

### 1.40 SOFTWARE AND PROFESSIONAL SERVICES REFERENCES

Proposers to use the format provided in the table below for providing reference information in conformance with the guidelines in Section I. The City has a strong preference for public sector references that are using the proposed software solution, for new implementation project references and not upgrades from a previous version, and for references that have worked with the proposed system integrator/value-added reseller.

- References Numbered 1 – 5: *(The Reference Table may be extended to add more references.)*
  - *Entity had a go-live date within the past five years*
- Reference Numbered 6: *(The Reference Table may be extended to add more references.)*
  - *Entity had a go-live date five or more years in the past*

In the event the Proposer cannot provide the required six references, the Proposer may substitute other organizations to ensure six total references are provided, with the understanding that this will be reflective in the evaluation of the Proposer. Substitute references may include those that are in the implementation process, have implemented comparable scopes of work without including all system modules, etc.

**Response:** Our customers and the integrity of their overall relationship with Infor is the single most important aspect of our business. Above all, we value the relationships that are forged through the design, implementation, and ongoing support of our more than 55,000 active customer installations.

To actively promote customer relationships through referrals, Infor has instituted a formal reference program which provides for real time access to our vast installation base, as may be required, to promote the continuing growth of our user family. The basic tenets of our reference program provide for the utmost confidentiality through structured and direct access to relevant vertical, non-competing, customer references and provide for unfettered dialogue regarding all aspects of their dealings with Infor.

While we have provided the requested reference contact information below to comply with the RFP instructions, we kindly request that the City reach out to Infor directly before contacting any of our references.

**Table 11-01 Reference Table**

Reference Table
Reference Number: <u>1</u>

Governmental Entity Name: Boulder Valley School District

What is the approximate staff count of the Entity? 4000 employees.

What is the approximate population served by the Entity? BVSD serves 30,000 students. The City of Boulder, CO has a population of 103,000 residents.

Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system): Migration of payroll, finance and supply chain to v11, CSF MTA, and a new implementation of GHR and WFM.

#### **Contact Information**

Address: 6500 Arapahoe

City, State, Zip: Boulder, CO 80303

Reference Contact Name: Amanda Boeye Title: Interim Manager of Business Information Systems

Phone No.: 720-561-5115 Email Address: [Amanda.Boeye@bvsd.org](mailto:Amanda.Boeye@bvsd.org)

Start Date of Project: 2020 live date Go-Live Date: March 2022

#### **Project Information**

Vendor Project Manager/Lead for this Client: Bob Cvevkus

Name and Version of software system installed: CloudSuite v11

Legacy software system replaced: Lawson

Scope of Modules installed: Migration of payroll, finance and supply chain to v11 CloudSuite Financials Multi-tenant, and new implementation of GHR and WFM.

Model used (Hosted, On-Premise, SaaS, etc.): SaaS

Is this reference still using the software? Yes ☒ No

Total Project Cost: \$5M

#### **Reference Table**

Reference Number: 2

Governmental Entity Name: City of Carrollton TX

What is the approximate staff count of the Entity? 1,000

What is the approximate population served by the Entity? 130,000

Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system): Inovium implemented Infor's workforce management solutions for the City in 2021. This included the rollout of both the Police and Fire departments along with their respective union requirements.

#### **Contact Information**

Address: 945 E. Jackson Road

City, State, Zip: Carrollton, TX

Reference Contact Name: Melissa Everett Title: Procurement

Phone No.: 972-466-3000 Email Address: [melissa.everett@cityofcarrollton.com](mailto:melissa.everett@cityofcarrollton.com)

Start Date of Project: July 2022

Go-Live Date: January 2022

### **Project Information**

Vendor Project Manager/Lead for this Client: Michael Brandt- Account Executive  
 Name and Version of software system installed: Infor Workforce Management Latest Release  
 Legacy software system replaced: Kronos  
 Scope of Modules installed: Workforce Management, Time and Attendance, Automated Scheduling, Mobility.  
 Model used (Hosted, On-Premise, SaaS, etc.): SaaS  
 Is this reference still using the software? Yes X No  
 Total Project Cost: We cannot disclose this information without client approval.

### **Reference Table**

Reference Number: 3

Governmental Entity Name: State of Idaho

What is the approximate staff count of the Entity? 2,000

What is the approximate population served by the Entity? 2,000,000

Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system) Various legacy on-premises systems were replaced with Infor CloudSuite including Infor HCM and WFM.

### **Contact Information**

Address: 700 W. State St. P.O. Box 83720  
 City, State, Zip: Boise, ID 83720-0011  
 Reference Contact Name: Scott Smith Title: Chief Deputy Controller  
 Phone No. : 208-334-3100 Email Address: [ssmi@sco.idaho.gov](mailto:ssmi@sco.idaho.gov)  
 Start Date of Project: 2020 Go-Live Date: 07/2023

### **Project Information**

Vendor Project Manager/Lead for this Client: Louisa Chan  
 Name and Version of software system installed: Infor HCM and WFM.  
 Legacy software system replaced: STARS  
 Scope of Modules installed: Infor CloudSuite Financials, Human Capital Management (HCM), Enterprise Asset Management (EAM), and WFM.  
 Model used (Hosted, On-Premise, SaaS, etc.): SaaS  
 Is this reference still using the software? Yes X No  
 Total Project Cost: \$5 Million+

### **Reference Table**

Reference Number: 4

Governmental Entity Name: City of Corpus Christi

What is the approximate staff count of the Entity? 3,300

What is the approximate population served by the Entity? 316,000

Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system) Workforce Management, time, attendance & scheduling

**Contact Information**

Address: 1201 leopard St,  
 City, State, Zip: Corpus Christi, TX 78402  
 Reference Contact Name: David Marshall Title: Arcanum Group  
 Phone No. : 303-731-1881 Email Address: [david.marshall@thearcanumgroup.com](mailto:david.marshall@thearcanumgroup.com)  
 Start Date of Project: 2021 Go-Live Date: 2022

**Project Information**

Vendor Project Manager/Lead for this Client: Mario DaRosa- Project Director  
 Name and Version of software system installed: Infor Workforce Management  
 Legacy software system replaced: Kronos  
 Scope of Modules installed: Workforce Management, Time and Attendance, Automated Scheduling, Mobility.  
 Model used (Hosted, On-Premise, SaaS, etc.): SaaS  
 Is this reference still using the software? Yes ☒ No  
Total Project Cost: We cannot disclose this information without client approval.

**Reference Table**

Reference Number: 5

Governmental Entity Name: Flour Marine Propulsion (Department of Energy)

What is the approximate staff count of the Entity? 2,040

What is the approximate population served by the Entity?

Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system)

**Contact Information**

Address: P.O. Box 79  
 City, State, Zip: West Mifflin, PA 15122  
 Reference Contact Name: David Marshall Title: Arcanum Group  
 Phone No : 303-731-1881 Email Address: [david.marshall@thearcanumgroup.com](mailto:david.marshall@thearcanumgroup.com)

Start Date of Project: 2023 Go-Live Date: 2024

**Project Information**

Vendor Project Manager/Lead for this Client: Mario Darosa Project Director  
 Name and Version of software system installed: Infor's Workforce Management  
 Legacy software system replaced: Kronos  
 Scope of Modules installed: Time and Attendance, and Scheduling  
 Model used (Hosted, On-Premise, SaaS, etc.): SaaS

Is this reference still using the software? Yes <input checked="" type="checkbox"/> No
Total Project Cost: We cannot disclose this information without client approval.
<b>Reference Table</b>
Reference Number: <u>6</u>
Governmental Entity Name: <u>City of Coral Gables</u>
What is the approximate staff count of the Entity? <u>1250</u>
What is the approximate population served by the Entity? <u>48,000</u>
Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system) The City of Coral Gables, FL, is driving Financial and Human Resources Transformation and Smart City Success. By partnering with Infor Public Sector, they have implemented a suite of Infor cloud applications to streamline financial management, supply chain operations, and human capital management. This initiative focuses on consolidating data through specialized industry-specific analytics and artificial intelligence.
<b>Contact Information</b>
Address: 1150 Anastasia Ave
City, State, Zip: Coral Gables FL 33134
Reference Contact Name: Raimundo Rodulfo Title: Director of Innovation Technology
Phone No.: 305-461-6739 Email Address: <a href="mailto:rrodulfo@coralgables.com">rrodulfo@coralgables.com</a>
Start Date of Project: 2020 Go-Live Date: 2021
<b>Project Information</b>
Vendor Project Manager/Lead for this Client: Mario DaRosa
Name and Version of software system installed: Infor Cloud Including HCM and WFM
Legacy software system replaced:
Scope of Modules installed: Financial Management, Supply chain operations, and Human Capital Management
Model used (Hosted, On-Premise, SaaS, etc.):
Is this reference still using the software? Yes <input checked="" type="checkbox"/> No
Total Project Cost: We cannot disclose this information without client's approval

- 1.41 If available, please provide two (2) Arizona government references using the proposed solution(s). In the event there is overlap/redundancy between the two (2) references provided here and above in Section II, this is acceptable. Vendors shall not list the City as a reference if the City is currently using one or more products offered by the Vendor.

**Table 11-02 Arizona Reference Table**

<b>Arizona Reference Table</b>
Reference Number: <u>1</u>
Governmental Entity Name: <u>NA</u>

<p>What is the approximate staff count of the Entity? NA</p> <p>What is the approximate population served by the Entity?</p>
<p>Detailed narrative description of work completed for this reference (e.g., upgrade process, new implementation for a client transitioning from a different legacy system):</p>
<p><b><u>Contact Information</u></b></p> <p>Address:</p> <p>City, State, Zip:</p> <p>Reference Contact Name: Title:</p> <p>Phone No.: Email Address:</p> <p>Start Date of Project: Go-Live Date:</p> <p><b><u>Project Information</u></b></p> <p>Vendor Project Manager/Lead for this Client:</p> <p>Name and Version of software system installed:</p> <p>Legacy software system replaced:</p> <p>Scope of Modules installed:</p> <p>Model used (Hosted, On-Premise, SaaS, etc.):</p> <p>Is this reference still using the software? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p><u>Total Project Cost:</u></p>

## 1.42 CONTRACT TERMINATION/NON-RENEWAL

Provide a summary of any contracts/license agreements/hosted subscriptions that the customer provided notice of cancellation to your firm, with or without cause, or elected to not renew in the past five years as it relates to the software solution proposed. The summary shall state the name of the customer, summary of the contract, term of the contract and reason for cancellation or non-renewal. *If none, state as such.*

Submitted as an Exhibit ☐ or Response provided as: X Not Applicable

## Tab 12 – Sample Contracts, Warranty, and Escrow

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### 1.43 SAMPLE CONTRACTS FOR EACH LICENSE MODEL PROPOSED

As an Exhibit to Part 12, Proposer to provide their sample contract(s) that would be used as basis for developing:

- i. The software licensing agreement (if applicable)
- ii. The recurring maintenance agreement (if applicable)
- iii. The software subscription agreement (if applicable)
- iv. The professional services agreement (if applicable)
- v. The data privacy agreement (if applicable)
- vi. Any other agreements (service level agreement, escrow, etc.) as applicable

Attached as an Exhibit: X

**Response:** We have provided SaaS Agreement for the Infor software as an exhibit under the “Proposal Exhibits” section, titled “Exhibits to Tab 12: Sample Contracts, Warranty, and Escrow.”

Proposer to describe the overall contract structure, including how (if any) MOUs or other inter-party agreements between sub-contractors would be structured:

**Response:** There are two core contracts which drive the purchase of the proposed software. One is a cloud Software Subscription Agreement covering the hosting and support of the proposed software and the other is a Master Services Agreement for the consulting provided to implement the proposed software. Once executed, Order Forms and Statements of Work are used to outline the software SKUs being purchased and the services being rendered.



Are the proposed software/services available for purchase through any existing cooperative purchasing agreements or pre-competed contracting vehicles (e.g., Omnia Partners, NASPO ValuePoint, Sourcewell, etc.)?

**Response:** Yes, there are several purchasing agreements as options through Infor partners.

#### 1.44 THIRD-PARTY LICENSE AGREEMENTS

As an Exhibit to Tab 12, Proposer to provide any third-party license agreements that would be separate from the Proposers license agreement, i.e., Adobe or other partner/third-party modules proposed.

Attached as an Exhibit: Unless the city chooses to contract directly with our partner Infor, we would provide all the licensing as their reseller.

#### 1.45 WARRANTY

A comprehensive warranty in form and content satisfactory to the City is sought by the City for all software and implementation services covered by this RFP. The entire system solution as proposed in this RFP must include a first-year warranty (for Proposer-supplied hardware and software) to conform to contractually agreed specifications, and to protect against any defects or damage caused by Manufacturer, Proposer, or subcontractors, in the systems' equipment or software. The year-one warranty will begin (for products accepted in phases) at the point that the system is officially accepted by the City. All repairs made under warranty will be at the sole expense of the Proposer (or Manufacturer), including parts, software, labor, travel expenses, meals, lodging and any other costs associated with the repair.

Proposer to provide as an Exhibit to Tab 12 or submit below a detailed explanation of their Warranty provisions. Proposer to be explicit in when the warranty period expires and when the fees for maintenance will start and be invoiced.

Attached as an Exhibit: X or detailed below as:

**Response:** The warranty is presented in the provided SaaS agreement as part of the ongoing cloud offering. Section 5: Warranties outlines ongoing warranties.

## Tab 13 – Exceptions to Project Scope and Contract Terms

---

The City reserves the right to disallow exceptions it finds are not in the best interests of the City. Any and all exceptions must be identified and fully explained in the submitted Proposal. It is the City's intention to be made aware of any exceptions to terms or conditions prior to contract negotiations.

*Note: Deviations to the payment and retainage schedule to be provided in the Price Proposal. Deviations to functionality to be provided in Tab 14 (Attachment B).*

### 1.46 DEVIATIONS TO SCOPE OF WORK

- i. The Proposer to identify and describe any exceptions/deviations to the Scope of Work and identify their impact to the City, including, but not limited to workarounds; reductions in performance; capacity; flexibility; accuracy; and ultimately, cost and value.

**Response:** Inovium has carefully reviewed the scope of work outlined in the RFP and is confident in our ability to meet the requirements of the City. Our proposed implementation methodology and the **Infor** system are well aligned with the City's objectives, ensuring long-term performance, capacity, flexibility, and accuracy. Our approach is to use the **Infor** system "as is" to minimize customizations and keep things simple while addressing the needs of the City comprehensively. This will ensure the system delivers maximum value and supports cost efficiency in the long term. Inovium will employ a structured process for unforeseen circumstances that arise during the project that require adjustments or workarounds. This will include detailed impact assessments, open communication with the City, and collaborative decision-making to ensure it aligns with the City's goals.

- ii. Proposer to identify the areas where they feel the requested service or product is not available, deviates from the specific requests, or is deemed an unwise or unwarranted approach.

**Response:** Inovium and Infor are pleased to be able to participate in your procurement process. We hope that you will find our proposal and contracting approach compelling.

We view the contract process differently than most vendors. We believe that entering into a contract should be a value-creation event for both Inovium and our customers. Because of this vision, we have taken great care to ensure that our SaaS Agreement reflects what our customers are asking for in a contract. In fact, Infor's SaaS Agreement includes many key provisions that provide additional protections for our customers that are uncommon in the software industry.

For example:

- **Material Degradation Warranty.** Infor warrants that updates will not result in a material loss of key functionality.
- **Software Warranty with an Extended Warranty Period.** Infor warrants that the software will operate without a material defect during the subscription term.
- **Malicious Code Warranty.** Infor provides a warranty that the software does not contain malicious code.
- **Indemnity Clause.** Infor provides an indemnity clause that is tied to personal data breaches.
- **Return of Data and Transition Services.** Infor offers a right to transition services upon termination of the Subscription Services and documents the processes for returning customer data in the Security Plan.
- **Enhanced Limitation of Liability.** Infor's SaaS Agreement includes increased liability for customer claims and a supercap for Infor's unauthorized disclosure of confidential information.
- **Robust Security Provisions.** Infor provides its customers with well-defined, robust security controls. These controls are available to review at <https://www.infor.com/security-plan> and will be incorporated into the final order documents by reference.

As previously mentioned, Inovium believes that the contract should be a value creation event for both parties, as it is the foundation for ensuring a mutually beneficial long-term relationship. The benefits of using the attached SaaS Agreement will provide you with many valuable contract terms, reduce the time and cost to negotiate an agreement, start the relationship on better footing, and enable you to get your project started sooner, ultimately resulting in a faster time to value.

Our goal is to be your preferred partner for any software needs. We have included a copy of Infor's SaaS Agreement with this proposal. We respectfully require that this contract be used as the basis for any resulting agreement and reserve the right to negotiate any additional or different terms.

We encourage you to compare the terms of Infor's SaaS Agreement with the contracts of other bidders. We trust that you will find that Infor's SaaS Agreement contains significantly more favorable terms with a focus on creating value for both parties, not simply minimizing risk and liability, as many software vendors do.

Please note that Infor's response is not a formal offer and cannot become a binding contractual commitment without a separate contract that has been mutually agreed upon and signed by both parties.

Inovium is proposing Infor's standard commercial software to meet the software functionality requirements specified in the RFP. Inovium has used good faith efforts to respond to your requirements. However, we cannot contractually guarantee current or future compliance with specific laws, or your policies or other specific information technology and security requirements. However, upon request, Infor can demonstrate its compliance with current

standards and policies so that you can determine the acceptability of Infor's commercial software.

Inovium is including Infor's Support program which can be found in the Service Level Agreement, which can be viewed at: <https://www.infor.com/service-level-description>.

#### 1.47 DEVIATIONS/EXCEPTIONS TO RFP TERMS AND CONDITIONS AS PROPOSED BY THE CITY

As an Exhibit to Tab 13, Proposer to provide any deviations or exceptions to the language proposed by the City in the RFP. Each item to be listed along with the requested alternative language for review by the City.

*If no deviations taken, state as such.* Substantive exceptions to the City's terms, submitted after the date and time established for the submittal of Proposals, will not be considered.

**Response:** Our only requirement is the use of the Infor cloud agreement and our Master Services Agreement as the starting point for contracts.

Exhibit submitted Yes ☒ No ☐

## Tab 14 – Functional and Technical Requirements Response

Inovium partnered with Infor have provided responses in Attachment A.

# Supplements

## Configuration as a Service (CaaS)-Optional

The key to any successful deployment is what happens after go-live. With offering, City of Surprise gains:

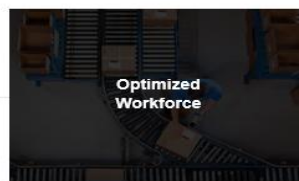
- 1) Ongoing Configuration Management
- 2) Strategic Software Adoption Support
- 3) Admin Staff Augmentation
- 4) Functional Support Desk and Portal
- 5) Ticketing System for Tracking Requests (Email/Web)
  - A. Nature of the Issue
  - B. Request Validation and Assignment
  - C. Provide Support, Direction and Content
  - D. Continual Status Updates
  - E. Collaboration on Issue Resolution
- 6) Cadence of Business/Functional Review Monthly
- 7) Product Functionality Adoption Recommendations
- 8) Product Functionality Adoption Recommendations
- 9) Communication Infor Product Functionality News

## Self Managed Nightmare



### Roadblocks to Success

- Not Up To Date On Product Capability
- Poor Adoption of Solutions
- Lagging With Industry Advancement
- Behind on Product Training
- Single Point of Failure
- Little Input on Product Future



### Optimized Workforce



### Lower Cost for Better Results

## Managed Configuration Success



### Keys to Success

- Always Up To Speed on New Release Value
- Lower Cost of Management / No Admin Needed
- Highly Trained Resources With Broad Customer Experiences
- We Recommend New Modules That Help You
- Highly Experienced Resources
- Direct Input into Product Futures

**infor**

BROCHURE

Infor U

## On-demand learning membership to advance your Infor product skills

Campus Plus Membership



### Unlimited access. Anytime learning. One fee.

Campus Plus Membership offers your entire organization 12 months of unlimited access to on-demand product training courses, providing a cost-effective solution to advance Infor product skills and knowledge across your teams.

Everyone in your organization, regardless of their roles, can access the on-demand content library and can explore and engage with it at their own pace and convenience.

With this membership, your teams have the perfect opportunity to acquire the skills needed to effectively use Infor products.

#### Membership highlights:



##### Continually develop and sustain skills

Gain access to the latest materials, including newly launched courses and product release training. Revisit courses as many times as needed to reinforce your skills.



##### Flexibility to consume what and when you want

Diverse on-demand learning options to suit all preferences. Whether your team needs a quick overview or in-depth knowledge, our eLearning courses, self-directed courses, workbooks, and task simulations provide the right educational experience.



##### Learning paths for independent growth

Benefit from expertly curated learning paths organized by industry, domain, product line, and role. These paths ensure a seamless and relevant learning experience for all learners.



##### Efficient and cost-effective learning

Pay once and enjoy hassle-free, unlimited on-demand learning for the entire year, without worrying about additional costs for each course.



Brochure

On-Demand Learning Membership to  
 Advance Your Infor Product Skills

### Key benefits of the membership:

-  Course workbooks
-  eLearning and recordings
-  Self-directed learning courses
-  Training guides and product simulations
-  Bi-annual product release training
-  Low-cost training environments for hands-on practice
-  25% savings on certification exams



### About Infor

Infor is a global leader in business cloud software products for companies in industry-specific markets. Infor builds complete industry suites in the cloud and efficiently deploys technology that puts the user experience first, leverages data science, and integrates easily into existing systems. Over 67,000 organizations worldwide rely on Infor to help overcome market disruptions and achieve business-wide digital transformation.

[infor.com](http://infor.com)

Explore how Campus  
 Plus can empower  
 your organization

LEARN MORE

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 INFOTP1872366-en-US-0924-10





# Proposal Exhibits

## Exhibits to Tab 4: Key Proposed Personnel and Team Organization

### Exhibit 1: Resume: Michael Brandt

**Name: Michael Brandt**  
**Chief Revenue Officer (CRO) - Inovium**

#### Summary

Michael is an established executive leader with 20+ years of proven experience within the Workforce Management and Human Capital Management space. Michael's focus is on helping organizations optimize their labor efficiency and effectiveness.

#### Education

- Warren National University Bachelors, Computer Science 1997 - 2001

#### Experience

##### ***Inovium, LLC***

##### **Chief Revenue Officer (CRO) - Inovium**

Jul 2023 - Present

##### **SVP of Sales and Alliances**

Apr 2020 - Jul 2023 (3 years 4 months)

Lead Alliances and Customer Relationships for a premier Workforce Management consulting firm. My focus is on helping our partners and customers realize the highest level of labor efficiency and workforce effectiveness through the implementation of best-in-class processes and Workforce Management, scheduling, Time, and Attendance software.

##### ***Infor, Inc.***

##### **RVP/Director of Workforce Management (WFM) - Major Accounts - Infor**

Jun 2014 - Apr 2020

- Partnering with the largest organizations in the world to navigate new technology, rewrite outdated stale business processes and achieve results that make life better for the everyday employee.
- Infor is the third largest provider of enterprise applications and services in the world. We help 90,000 customers in over 160 countries improve operational efficiencies and quickly adapt to changes in their business demands.
- Managing the entire range of Human Capital Management solutions, Infor brings the broadest, most complete end-to-end HCM suite to market in Infor CloudSuite. Infor's approach allows us to be software agnostic and address the client at their most immediate point of need. This is contrary to standard silo'd software's idea of generating the need for their given solution allowing Infor to be not just a vendor but a strategic partner.

**Co-Owner/Board Member - BrightMove, Inc.**

Jul 2009 - Aug 2018 (9 years 2 months)

Owner and board member with the industry's leading staffing and RPO SaaS software solution

**EVP Mid-Market Business Group - Softscape**

Dec 2008 - Jul 2009 (8 months)

GM of Softscape's Global Mid-Market Operations where I managed the operations and sales for our solutions for SMB and Mid-Market companies.

Responsibilities Include:

- Responsible for growing new product offering for mid-market solutions.
- Managed P&L for Global Mid-Market team
- Responsible for product functionality guidance to better deliver to mid-market organizations
- Created brand and product concept for new Mid-Market SaaS offering.

**EVP Asia Pacific**

May 2007 - Dec 2008 (1 year 8 months)

Michael managed sales operations, services and P&L for Softscape's Asia Pacific region consisting of 50 personnel located in three offices.

- Grew Asia Pacific sales operation from zero to 3 million within the first two years.
- Exceeded Year 1 and Year 2 Sales and Services Goals
- Won key accounts, including Lion Nathan, Monash University, and Foxtel's, first year in the region.
- Managed a multi-million-dollar P&L for Sydney, Bangkok, and Hong Kong offices.
- Managed a team of 50 staff in Sydney, Bangkok and Hong Kong
- Built strategic alliances with key analysts and consulting firms in the region to optimize opportunity exposure to new and future tenders.
- Hired a team of services personnel that deploy two-multimillion-dollar accounts while in region
- Maintained profitable operations and ensured on-target 3 times growth in new business.
- Built and maintained a 30-million-dollar pipeline within the first 18 months with no marketing budget

**Director of Operations – Vurv Technology**

Mar 1999 - May 2007 (8 years 3 months)

Reporting directly to the VP of Services in the United States, responsibilities included managing and planning the operational team responsible for delivering on Vurv's solutions in region and managing their global customer relationships. Key accomplishments included the deployment of HSBC globally in 13 countries, deployment of Coca-Cola Amatil in Asia Pacific and deployment of ACT Government.

- Remodeled Asia Pacific operation to a profitable model in first quarter in region

- Budgetary planning and execution of a multi-million-dollar services department covering Asia-Pacific and Oceania.
- Built operational approach for all future deployments of Vurv global services operation.
- Built strategic alliances to allow for an outsourced revenue model which in turn eliminated staff bench costs.
- Managed services department to be profitable within 1 year.
- Team managed deployments for Coca-Cola Amatil, HSBC APAC, MGM Macau, and ACT Government
- Built a team of regionally knowledgeable staff to allow for strong strategic growth in each region of focus.

#### **Director of Engineering - Computerwork.com**

Aug 1995 - May 1999 (3 years 10 months)

Reporting directly to the President and CEO, duties included e-strategy business consulting, business development, and architecting internet-based job network and network infrastructure.

- Managed development team responsible for ongoing programming and maintenance of Computerwork.com (IT job board)
- Led internet traffic building (SEO) and search engine optimization efforts for search engine placement, increasing traffic to site and candidate intake tenfold.
- Developed strategic plans for emerging corporate technical initiatives as well as producing technical architecture solutions for site development and systems integration efforts.

#### **On-Site HR Manager – AccuStaff at (AT&T)**

1992 - Aug 1995 (3 years)

Managed 150+ employees for the client (AT&T) where we were responsible for performance management, enforcing HR policies, and managing customer relationships with multi-million-dollar contingent workforce clients.

- Managed at all levels of Human Resources for Staff
- Raised retention 100% during my first 6 months.
- Increased performance 10-fold for AT&T and lowered turnover by 220%

### **Exhibit 2: Resume: Steve Ahn**

**Name: Steve Ahn**

**Chief Strategy Officer**

#### **Summary**

Senior executive, Architect, implementation leader and software engineer specializing in workforce transformations since 2005. Strategic advisor to senior management and industry mentor.

#### **Education & Certifications**

- University Of California, Irvine 09/2001 to 06/2005 Irvine, CA
- Degree: Bachelor of Science in Information and Computer Science
- Project Emphasis: Software Systems, Database Management

### Technical Skills and Expertise

- Software Development Methodologies: Scrum/Agile, Rapid Prototyping
- Languages and Frameworks: Java (J2EE), jQuery, Coffeescript, Play2
- Database: Oracle, Microsoft SQL Server, IBM DB2, Postgres
- AWS: EC2, S3, Lambda
- Other: Balsamiq wireframe, Amazon AWS EC2, Jira, Confluence, Bitbucket/Git

### Industry Experience

- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• Retail</li> <li>• Manufacturing</li> <li>• Health Care</li> </ul> | <ul style="list-style-type: none"> <li>• Entertainment</li> <li>• Finance/Insurance</li> <li>• Hospitality</li> </ul> | <ul style="list-style-type: none"> <li>• Grocery</li> <li>• Aviation/Airlines</li> <li>• Public Sector</li> </ul> |
|--|---|---|

### Work Experience

#### Chief Strategy Officer and Lead Solution Architect 7/2018 to current

##### *Inovium, LLC., Irvine, CA*

Lead Inovium's entire consulting team and architects.

My team produces budgetary estimates, RFP responses, and statement of work contracts in a variety of industries. Escalation points for product, project, and personnel issues.

- Develop agile practices using a blend of scaled scrum and Kanban.
- Negotiate project scope, timelines, and costs.
- Procure IT services for operations, including AWS EC2 servers, Jira, Confluence, and Bitbucket.
- Define git branching strategy, pull request approvals, and path to a CICD release cadence.

#### Independent Lead Engineer 8/2016 to 7/2018

##### *Various Clients*

Implement time and attendance solution for a large, multinational retailer. Coordinate with legal teams, operations, and business stakeholders to develop pay rules and entitlement grants that adhere to local, state, and federal laws. Work in distributed scrum teams to produce scalable solutions for 200k+ employees.

- Lead a team of five engineers configuring and developing time and attendance Product.
- Produce dev-ops model and get best practices across seven distributed scrum teams.
- Advise scrum master and product owners on core principals of scaled scrum.

#### Solution Architect 4/2012 to 6/2016

##### *Warner Bros., Burbank, CA*

Implemented Infor Workbrain solution for union and non-union populations. Architect new modules from requirements to go-live, utilizing wireframing tools and rapid prototyping to accelerate client acceptance. Managed environment deployment, migrations, and transition to long term support.

- Developed entitlement accruals system to adhere to union CBAs.
- Developed an allocation system to integrate financial coding to time entry.
- Point person for integration, data analytics, and business processes.

#### **Senior Consultant 12/2011 to 4/2012**

##### **Dayforce, Irvine, CA**

Implement workforce management solutions for time and attendance and labor scheduling in a SaaS model. Gather requirements, configure, and manage a project to adhere to client policy, state labor laws, and industry best practices.

- Integrate external systems with import and export interfaces.
- Assist in project management, scope analysis, support transition, and resource management.

#### **Principal Technical Consultant 11/2010 to 12/2011**

Infor Global Systems, Newport Beach, CA

Implement workforce management solutions in Infor WFM Time and Attendance and Labor Scheduling modules. Scope, design, and develop J2EE extensions that adhere to client policies, union rules, and industry best-practices.

- Scope and implement labor forecasting and budgeting model.
- Evaluate and configure schedule optimization model based on historical data.
- Implement client-side Java messaging web services using Apache Axis.

#### **Senior J2EE Developer 11/2009 to 5/2010**

Equimine, Lake Forest, CA

Develop software solutions in an agile environment using the J2EE framework, Google Web Toolkit, Kiyaa, and PureMVC.

- Build a real estate tool to analyze return on investment.
- Implement software solution to facilitate foreclosure purchase/resale.
- Develop alerting framework using email and SMS APIs.

#### **Technical Consultant 1/2005 to 11/2009**

Workbrain, Newport Beach, CA

Build workforce management solutions in Workbrain Time and Attendance and Labor Scheduling.

- Develop custom pay rules, entitlement policies, labor scheduling, and reports.
- Assist in project tasks such as impact analysis, change control, effort sizing, proof of concept, and resource management.

### Exhibit 3: Resume: Dan Miller

<b>Name: Dan Miller</b> <b>Solutions Architect   Infor/Lawson Expert</b>	
<b>Summary</b> <p>Highly experienced Solutions Architect with deep expertise in Infor (formerly Lawson) enterprise software solutions. Over two decades of experience in software architecture, development, implementation, and optimization for Infor applications, specializing in HR Talent, Payroll, Benefits, and Talent Management solutions. Adept at working with enterprise clients to deliver scalable and efficient solutions that enhance business operations.</p>	
<b>Core Competencies</b> <ul style="list-style-type: none"> <li>• Infor/Lawson ERP Implementation &amp; Optimization</li> <li>• HR, Payroll, Benefits, and Talent Management Solutions</li> <li>• Solution Architecture &amp; Design</li> <li>• Enterprise Software Development &amp; Integration</li> <li>• Agile &amp; Scaled Agile Framework (SAFe)</li> <li>• ETL (Extract, Transform, Load) &amp; Process Automation</li> <li>• Customer Engagement &amp; Vendor Collaboration</li> <li>• Jira, Confluence, XML, Web Services, SaaS</li> </ul>	
<b>Education &amp; Certifications</b> <ul style="list-style-type: none"> <li>• Bachelor's degree in computer science, University of Minnesota</li> <li>• Certified Scrum Master (CSM)</li> </ul>	
<b>Technical Skills</b>	
<ul style="list-style-type: none"> <li>• Infor/Lawson Landmark and LPL Development</li> <li>• SQL, XML, Web Services, APIs</li> </ul>	<ul style="list-style-type: none"> <li>• Jira, Confluence, Agile Methodologies</li> <li>• ETL Tools &amp; Data Transformation</li> <li>• Cloud Deployments (AWS, Azure)</li> </ul>
<b>Experience</b>	
<b>Inovium</b> <b>Project Director (Sep 2024 – Present)</b> <ul style="list-style-type: none"> <li>• Lead enterprise solutions for Infor/Lawson implementations and integrations.</li> <li>• Design and optimize ERP configurations tailored to customer business processes.</li> <li>• Provide technical leadership for system migrations and data transformations.</li> </ul>	
<b>Infor (formerly Lawson Software) 2006-2024</b> <b>Vice President of Software Development (Feb 2017 – Aug 2024)</b> <ul style="list-style-type: none"> <li>• Directed the development and roadmap for Infor HR Talent and Payroll solutions.</li> <li>• Led large-scale ERP implementations for enterprise clients across multiple industries.</li> <li>• Managed cross-functional teams, ensuring seamless integration of HRIS, Payroll, and Benefits.</li> </ul>	
<b>Senior Director   Director   Senior Principal Software Architect (Jan 2015 – Jan 2017)</b> <ul style="list-style-type: none"> <li>• Drove key initiatives for software modernization, focusing on cloud-based Infor solutions.</li> <li>• Served as a technical escalation point for complex implementations and customer issues.</li> </ul>	
<b>Principal Software Architect (Jan 2012 – May 2013)</b>	

- Developed new features and capabilities for Infor Talent Management software.
- Worked closely with global customers to define and prioritize system requirements.

#### **Software Architect | Senior Systems Engineer | Senior Business Analyst (2006 – 2012)**

- Designed and deployed enterprise-wide HR and Payroll solutions for Fortune 500 clients.
- Developed an interface strategy for synchronizing effective-dated HR data across systems.

#### **Key Customers Supported**

- **Healthcare:** HCA, Faith Regional Health Services, Common Spirit Health, CHRISTUS Health, Yale New Haven Health System
- **Public Sector:** State of Michigan, Central Ohio Transit Authority, City of Coral Gables
- **Retail & Manufacturing:** Ashley Furniture Inc, Pilot Flying J, Koch Industries

### **Exhibit 4: Resume: Mario Da Roza**

**Name: Mario Da Roza**

**PMP, P. Eng, MMA VP of Customer Delivery**

#### **Summary**

A resourceful and passionate business leader with over 20 years' experience in creating, implementing and driving professional services, workforce solutions and customer success strategies. A dynamic solutions-oriented individual with a strong results focus, a track record for fast execution and promoting positive change. Mario has won countless awards in the workforce space.

#### **Education, Certificates, Training**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Queen's University, Kingston, Ontario</li> <li>• Master of Management Analytics 2016</li> <li>• VP of Industry Relations</li> <li>• Graduating GPA 4.0</li> <li>• Queen's University, Kingston, Ontario</li> <li>• Bachelor of Applied Science with Professional Experience 2000</li> <li>• Electrical Engineering (Computer Option)</li> </ul> | <ul style="list-style-type: none"> <li>• Project Management Institute</li> <li>• Member 2010</li> <li>• IBM Canada</li> <li>• IBM LOVEM (Line of Visibility of Engineering Methodology) 1998</li> <li>• Process Engineering and Management Workshop</li> <li>• Project Management Workshop</li> </ul> |
|--|---|

#### **Professional Experience**

##### **Inovium LLC, AR Jan 2022 - Present**

- VP of Customer Delivery
- Responsible for management, methodology and delivery of Inovium projects and project management team:
  - Project methodology design and implementation.
  - Management of team of highly skilled Scrum Masters (Project Leaders)
  - Management of Inovium Labs (think tank for customer innovation and workforce optimization)



- o Speaker, Researcher, and Workforce Optimization thought leader for Inovium and our customers.

### **Walmart, AR (Contract) Feb 2015 - 2022**

#### **Management Consultant**

- Responsible for the implementation of Global Workforce Management Solution across Walmart (2.4 million active associates, and 6 million inactive associates)
  - o Workforce analytics development
  - o Conduct cost-benefit and efficiency analysis on as-is process
  - o Develop to-be processes in accordance with upcoming state laws
  - o Support Vendor with implementation of the solution
  - o Develop roll out plan to WMT stores, clubs, Home Offices and logistics locations
  - o Development of Walmart chatbot, deployed to over 2MM WMT employees worldwide

#### **Awards**

- Winner Global Hackathon – 2019

### **Trapeze Group, ON Sept 2013 – Feb 2015**

#### **Director, Customer Care**

- Responsible for Customer Success, and Support organizations
- P&L Leader for the Customer Care organization
  - o Responsible for \$52MM in Revenue
  - o Generated 12% recurring revenue growth while retaining in excess of 98% of revenue
  - o Negotiated multi-million-dollar maintenance contracts to solidify future recurring revenue
- Increased C-SAT from 4.4/5.0 to 4.83/5.0 within 9 months
- Reduced Response time by 64% and Resolution time by 20%
- Created a multi-tenant Customer Success Framework that includes:
  - o Customer Persona
  - o CSM Coverage model
  - o CSM Playbook and tools
  - o Success Strategy for each customer segment
  - o Measureable Engagement Framework
- Revamped customer feedback process by implementing the following tools:
  - o NPS
  - o CES
  - o Customer Journey map

#### **Awards**

Volaris Superhero – 2014

Recognized as one of 25 superheroes across 19 Volaris companies.

### **Prophix Software, ON Jun 2010 – Sept 2013**

Manager, PMO & Customer Success

- Developed a Customer Success model that focuses on driving life-value for standard and premium customers
  - o Defined new orientation of the Customer Empowerment Series (Webinar for Customers on product and features update)
  - o Led Visioning Sessions to enable customers to promote through the CPM Maturity model
  - o Resulted in an increase of 130% in Scope Expansion
- Standardized implementation methodology (H1 2011) and Instill elements to provide focus on Customer Experience (H2 2011)
  - o Improved NPS from 13% (2011) to 60% (YTD)
  - o § NPS was not used as a measurement tool prior to 2011
  - o Number of Reference accounts increased by 165%
- Managed a team of 6 PM's and 12 Consultants
  - o Achieved 100% customer reference ability on all implementations
  - o P&L responsibilities
- Internal projects sponsorship
  - o 2012 PS Symposium – led a group of 20 Professional Services leaders in defining the strategy of the upcoming year.
  - o 2013 User Conference – planning committee

### **Awards**

- o PM of the Year – 2010
- o Over the Top Award – 2011
- o Innovation Award – 2012
- o Innovation Award – 2013

### **Workforce Insight, CO (formerly Entry Point Global, ON) Mar 2006 – May 2010**

Senior Project Manager

- Managed enterprise-level implementations of IT solutions using SDLC methodologies for multiple international organizations with users ranging from 200,000 to 1.2 million. Activities included scope planning and management, project control & execution, budget & cost analysis, vendor management, and requirements management for multiple Fortune 100 companies.

### **Target Corp (Contract) Minneapolis, MN Oct 2004 – Mar 2006**

Management Consultant / Project Manager, Target Technology Services

- Oversaw the entire Workforce management (Time and Labor & Labor Forecasting and Schedule Optimization) solution implementation.

- Conducted Business Process Analysis to achieve higher operation efficiency.
- Functioned as management consultant to Target senior management to develop implementation and rollout strategies including:
  - o Developed implementation plans for parallel tests, and full production rollout.
  - o Performed risk assessments - informed Target about potential risks and developed contingency plans.
  - o Provided resource recommendations.
  - o Liaised with vendor (Workbrain and PeopleSoft) to ensure quality of functional and technical solutions.
  - o Provided technical and functional leadership in all modules of the Workbrain implementation.

#### **Infor (formerly Workbrain Inc) Toronto, ON Apr 2002 – Oct 2004**

- Lead Solutions Consultant, Professional Services
- Led a team of 5 technical and functional consultants and was responsible for utilization and revenue targets.
- Worked with client personnel, across different industries, to understand business needs to create innovative solutions to automate complex employee interactions.
- Selected by senior management team to champion the design of a two-week intensive training program for new Project Managers, Technical and Functional Consultants.  
 Responsibilities include:
  - Developed creative training program to simulate a project life cycle.
  - Functioned as Technical Lead to coordinate a global roll-out of an enterprise solution for one of the largest global financial institutions.
  - Organized regular status meetings to identify development issues present clear direction on upcoming deliverables.
  - Assisted junior team members to identify and achieve personal success factors.
  - Provided thought leadership to Workbrain Product Management, Instance Management and Customer Support department to improve deployments to customers.

#### **Awards**

- Code Library Award - 2003

### **Exhibit 5: Resume: Michael Anderson**

**Name: Michael Anderson**

**Practice Director**

#### **Summary**

Dynamic leader and practice director for Inovium's Infor practice. Michael brings over 15 years of experience consulting in, managing, supporting and leading projects. Michael's team of consultants average well over a decade of experience implementing HR and Workforce Management solutions across virtually every industry

## Education

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>Georgia Southern University</li> <li>Bachelors of Science</li> </ul> | <ul style="list-style-type: none"> <li>Minor: Marketing</li> <li>Major: Business Sport Management</li> </ul> |
|---|--|

## Professional Experience

### Inovium: Full Time 4/1/2024 – Present

#### Director of Delivery

Managed net new WFM and HCM implementations, serving as the primary escalation point for WFM and HRT projects. Led business development efforts, including vendor partnerships, sales, estimating, and SOW/contract review, while ensuring governance and best practices across all implementations. Focused on process improvement, automation, and reporting to streamline implementations, maintaining quality control to ensure satisfaction for internal teams, clients, and vendors. Developed and managed internal initiatives, aligning team KPIs with company goals and strategy.

#### Program Manager/Team Manager

Lead a team of 22 Project Managers and Architects, overseeing daily operations, performance, and job satisfaction. Manage WFM installations for multinational clients, including global retailers, airlines, and health systems, ensuring budgets, timelines, and deliverables are met. Provide solutions for WFM-related issues, with expertise in platforms such as UKG, Infor, Legion, Reflexis /Zebra, Opus, Planara, WorkJam, and Work Day. Oversee effort estimates, SOW writing, and governance, and manage client accounts and communications post-sales handoff. Drive revenue growth through client development and maintain high customer satisfaction and referenceable accounts. Lead internal initiatives, including Non-bill Codes, PMO Process Updates, and Post-Covid Delivery Methodology.

### Legion Technologies (Contractor) 7/15/2020 – 5/28/2021

#### Principle Customer Success Director

Managed Workforce Management and Time & Attendance installs, creating solution blueprints and leading client discovery. Served as Project Owner, leading the Legion product implementation according to client expectations. Oversaw product testing and managed all project documentation, including creating install process documentation for the Customer Success Division.

### Reflexis Systems Inc: Kennesaw, GA 7/2014 – 7/12/2020

#### Director of Workforce Management Implementation

Manage a team of 4 Project Managers across WFM implementation projects in banking, retail, hospitality, and logistics. Oversee the WFM program, measuring success based on completion time, budget, and margin. Create SOWs, LOE estimates, and professional services pricing models, while maintaining and adjusting the install process and documentation. Lead a program portfolio with both milestone-driven and T&M pricing models, and manage the PM toolset within the PMO. Actively participate in steering committee meetings.

#### Sr. Implementation Project Manager

Own and manage client-facing software implementations for Workforce Management, Time and Attendance, Task Management, KPI, and Audit Systems. Oversee all phases, from kickoff and discovery to configuration, UAT, pilot, and rollout. Assess, mitigate, and document issues, managing discovery and scoping to identify solution gaps. Lead internal implementation teams, creating project plans with milestones, timelines, and assignments. Set client expectations for milestones, deliverables, and processes, promoting clear communication internally and externally. Communicate client requirements and configuration changes to the technical team, and provide weekly status reports, facilitating steering meetings. Responsible for reporting risks to both internal teams and clients.

**Dominion Enterprises: Norfolk, VA 10/2013 - 7/2014**

**Director of Implementation: DX1 System**

Managed the DX1 software program for car, powersport, boat, and heavy equipment dealers in the US and Canada, overseeing a team of 10 Project Managers, Installers, Trainers, and Developers. Created implementation process guidelines, training standards, and an LMS system for all implementations. Developed the DX1 product implementation playbook and served as the escalation point for 20–30 new client installs monthly, ensuring all projects stayed on time and within budget. Measured time cost accounting for LOE and staffing guidelines, created and edited SOWs, and monitored project and personnel KPIs for bonus adjustments. Contributed to strategic planning and partnered with the web marketing team to integrate CRM and web marketing into the DX1 product.

**ADP Dealer Services: Augusta, GA 8/2010 - 10/2013**

Led a PMO team of 8 junior and 4 senior PMs, overseeing hiring, onboarding, and mentoring of new hires. Collaborated with the PMO Director and Region Director to assign projects and responsibilities within the PMO.

**Program Manager**

Managed the Ford ACE Initiative Program, developed by ADP with requirements from Ford Motor Co., designed to upsell parts and service through a configurable inspection list for serviced vehicles. Led the installation and rollout of the application across Ford dealerships and service sites nationwide, overseeing a team of 4 PMs to assess program success and impact. Conducted meetings with Ford Executives for status updates and feedback, while mitigating software performance issues and ensuring integration with Dealership DMS. Captured and communicated change requests and additional software requirements from Ford.

**Project Manager**

Managed DMS and software add-on installs across the US and Canada, serving as the project owner and main client contact. Oversaw resource allocation and timelines, leading teams of up to 70 SMEs. Adhered to ADP process guidelines and documentation practices, ensuring milestones, deliverables, and rollout dates were met. Provided weekly status reports to senior management and client-facing updates, while creating and reviewing detailed project plans. Facilitated communication across project partners and stakeholders, setting expectations on timelines, deliverables, and risks. Ensured alignment and consensus for all phases of the installation.

## Exhibits to Tab 12: Sample Contracts, Warranty, and Escrow

### SaaS Agreement for the Infor software



#### Software as a Service Agreement

This Software as a Service Agreement (the "Agreement") is between **Infor (US), LLC** ("Infor") and \_\_\_\_\_ ("Customer") and entered as of the last signature date below. The parties agree as follows:

#### 1. Definitions.

**"Affiliate"** means, with respect to either party, any entity that directly or through one or more intermediaries Controls, is Controlled by, or is under common Control with a party, where "Control" means the ownership of greater than 50% of such entity's capital stock.

**"Applicable Law"** means any applicable law, or declaration, decree, directive, legislative enactment, order, ordinance, regulation, rule, or other binding restriction of or by any governmental authority, having the full force and effect of law.

**"Authorized Users"** means employees and contractors of Customer and its Affiliates.

**"Confidential Information"** means non-public information identified as, or would be reasonably understood to be, confidential and/or proprietary. Confidential Information of Infor includes, without limitation, the Documentation and the Software. Confidential Information does not include information that: (i) is or becomes known to the public without fault or breach of Recipient; (ii) Discloser regularly discloses to third parties without restriction on disclosure; (iii) Recipient obtains from a third party without restriction on disclosure and without breach of a non-disclosure obligation known to Recipient; (iv) is independently developed by Recipient without use of Confidential Information; or (v) is a comment or suggestion about the other party's products or services.

**"Customer Data"** means information provided, entered or uploaded by Authorized Users into the Software. Customer Data is Confidential Information of Customer.

**"Defect"** means a material deviation between the then current, general release version of the Software and its Documentation.

**"Discloser"** means the party providing Confidential Information to the Recipient.

**"Documentation"** means the then current Infor provided generally available operating and technical documentation relating to the features, functions, and operation of the Software.

**"Initial Subscription Term"** means the initial subscription period set forth on the applicable Order Form.

**"Intellectual Property Rights"** means any and all rights in patents, copyrights, trademarks, trade secrets and service marks.

**"Order Form"** means any order form signed by the parties that references this Agreement pursuant to which Customer purchases access rights to Software and Subscription Services.

**"Personal Data"** means information that includes any non-public personal information that identifies and/or can be used to identify an individual, or as further defined by applicable data protection law. Personal Data is a subset of Customer Data.

**"Professional Services"** is defined in Exhibit A to this Agreement. If Infor provides professional services under an existing Infor professional services agreement (as specified in the work order for such professional services) such professional services are not subject to this Agreement and all references herein to Professional Services are inapplicable.

**"Professional Services Fees"** means fees for Professional Services as set forth in the applicable Work Order.

**"Recipient"** means the party receiving Confidential Information of Discloser.

**"Renewal Term"** means any renewal term of Customer's right to access the Software and Subscription Services following expiration of the Initial Subscription Term.

**"Software"** means the software programs identified in the applicable Order Form to which Infor provides remote access as part of the Subscription Services. Software includes Updates.

**"Subscription Fees"** means the fees for the Subscription Services set forth on the applicable Order Form.

**"Subscription Services"** means the hosting, management and operation of the Software, and Support, by Infor.

**"Subscription Term"** means the Initial Subscription Term or any Renewal Term, as applicable.

**"Support"** means, as more fully set out in the Order Form, (a) providing Customer with access (via the internet, telephone or other means established by Infor) to Infor's support helpline, (b) installing, when and if generally available, Updates; and (c) using



reasonable efforts to correct or circumvent any Defect. Support does not include Professional Services, including, without limitation, any of configuration, installation or implementation.

“**Third-Party Offerings**” means products and services that are provided by third parties, interoperate with the Software or Subscription Services, and are licensed under such third parties’ own applicable license terms.

“**Updates**” means generally available updates, enhancements or modifications to the then current, general release version of the Software that are not separately priced as new products.

“**User Restriction**” means any limitation on the Software or Subscription Services identified in an Order Form (e.g., number of Authorized Users or locations). User Restrictions are cumulative for all Authorized Users.

“**UserID**” means a unique user identification credential used in combination with a unique password to access the Software and Subscription Services.

## **2. Intellectual Property Rights and Restrictions.**

a. **Rights Grant by Infor.** Subject to this Agreement and the applicable Order Form, including applicable User Restrictions therein, Infor hereby grants Customer the right, for it and its Authorized Users, to access, in an operating environment hosted by Infor, the Software and use the Subscription Services, during the Subscription Term, solely for the internal operations of Customer and its Affiliates. Customer shall ensure Authorized Users comply with this Agreement and shall be liable for any noncompliance by Authorized Users.

b. **Documentation.** Infor hereby grants Customer a non-exclusive, non-transferable license (without the right to sublease or sublicense) to make a reasonable number of copies of the Documentation for the internal operations of Customer and its Affiliates in accordance with this Agreement. Authorized Users must reproduce the unaltered Intellectual Property Rights notice(s) in any such copies.

c. **Additional Restrictions.** Authorized Users are prohibited from (i) attempting, causing or permitting the reverse engineering, disassembly or de-compilation of the Software; (ii) using the Software or Subscription Services to provide service bureau services to, or to otherwise provide data processing services for the benefit of, third parties; (iii) allowing the Software or Subscription Services or Documentation to be used by, or disclosing all or any part of the Software or Documentation to, any person except Authorized Users; (iv) removing or altering any Intellectual Property Rights notice(s) embedded in, or that Infor otherwise provides with, the Subscription Services or Documentation; (v) violating or circumventing any restrictions specified in this Agreement or technological restrictions in the Subscription Services; or (vi) providing Customer Data that violates third party rights.

d. **Export Restrictions.** Customer acknowledges the Software and Subscription Services are U.S. origin and supported from the U.S. in whole or part, and are subject to U.S. export control laws and other applicable export and import laws. Authorized Users will not export, reexport, transfer, or use the Software or Subscription Services in violation of applicable export or import laws, economic sanctions laws, or other Applicable Laws.

e. **No Implied Rights.** Any rights not expressly granted in this Agreement are expressly reserved.

## **3. Subscription Services.**

a. **Generally.** Infor will provide the Subscription Services, as more particularly described in the Service Level Agreement referenced in the applicable Order Form discussing availability, scheduled maintenance, business continuity, disaster recovery, and Support.

b. **Security.** Infor’s Information Security Plan, setting forth the security measures with respect to the Software and Subscription Services, is referenced in the Order Form.

c. **User Accounts.** Customer shall ensure unique UserIDs and passwords are assigned to each Authorized User and Customer shall be responsible for managing such UserIDs and passwords through the Software interface. Customer shall maintain, and shall cause its Authorized Users to maintain, the confidentiality of UserIDs and passwords. Customer is responsible for all activities undertaken with UserIDs registered on Customer’s account. Customer will immediately notify Infor of any unauthorized use of UserIDs.

d. **Connectivity.** Customer is responsible for ensuring latency and available bandwidth from Authorized Users’ devices to Infor’s hosted routers are adequate to meet Customer’s desired level of performance. Customer is responsible for securing connectivity to Infor’s hosted environment, including securing VPN connectivity for single tenant environments.

e. **Customizations.** Customizations are not permitted in the hosted environment. “Customizations” means modifications to the generally available Software other than configurations and extensions created by Authorized Users via the standard user interface or tools included in the generally available Software.



f. Abrogation of Support. Infor has no Support obligations to the extent caused by (i) Customer deployed Third Party Offerings; or (ii) issues resulting from or arising out of professional services performed other than by Infor.

#### 4. Payment and Taxes.

a. Fees. Payment terms are specified in the Order Form or Work Order. Customer shall be responsible for reasonable fees associated with third party collection efforts actually incurred by Infor as a result of Customer's failure to pay on time. After the Initial Subscription Term, Subscription Fees are subject to annual adjustment. Renewal Subscription Fees are due prior to the commencement of the Renewal Term. Except as otherwise set forth in this Agreement, all payments are non-refundable.

b. Taxes. Customer is responsible for paying all taxes relating to this Agreement (except for taxes based on Infor's net income or capital stock). Applicable tax amounts (if any) are not included in the fees set forth on any Order Form or Work Order. Infor will invoice Customer for applicable tax amounts.

c. Invoice Dispute. Infor will not exercise its suspension or termination rights with respect to non-payment by Customer if Customer reasonably disputes the applicable fees within 10 days of Customer's receipt of the invoice in writing and in good faith, and is cooperating diligently to resolve the dispute. Invoices will be sent to the electronic address identified in the Order Form (the date of receipt of the invoice is the date Infor sends the invoice to such electronic address; if no such electronic address is provided, then the date of receipt of the invoice is the date Infor sends the invoice by the alternative method identified in the Order Form). However, if the parties are unable to resolve such a dispute within 20 days, each party shall have the right to seek any remedies it may have under this Agreement. For clarity, any undisputed amounts must be paid in full.

#### 5. Warranties.

a. Limited Software Warranty. Infor warrants the Software will operate without a Defect during the Subscription Term. Infor's sole obligation with respect to a breach of the foregoing warranty shall be to repair or replace the Software giving rise to the breach within a reasonable period of time. If Infor is unable to repair or replace such Software within a reasonable period of time, Infor may terminate the access rights for that Software and promptly refund to Customer the unused portion of the Subscription Fee if any, paid to Infor for the Subscription Services giving rise to the warranty claim.

b. No Material Loss in Functionality. Updates will not result in a material loss in key functionality. For clarity, Updates that require a different look and feel, or manner, to achieve similar functionality, or changes to programming language consistent with industry standards, are not a material loss in functionality. Customer's sole remedy with respect to a breach of the foregoing warranty shall be to terminate the access rights for that Software on written notice to Infor if functionality is not restored (either within that same Software or through different software or services available to Customer, at Infor's discretion) within 90 days of notice from Customer (which must be received within 30 days of the Update). In the event of such termination Infor shall promptly refund to Customer the un-used portion of the Subscription Fee, if any, paid to Infor for the affected Software. This remedy is not cumulative to the remedy in Section 5(a).

c. Malicious Code. Infor warrants it will use generally accepted industry tools and practices to provide Software and Subscription Services that do not contain any "time bombs," "worms," "viruses," "Trojan horses," "protect codes," "data destruct keys," or other programming devices that are intended to modify, delete, damage, deactivate or disable Customer Data.

d. Abrogation of Limited Warranty. Infor will have no obligation under this Section 5 to the extent any alleged breach of warranty is caused by: (i) any Customer deployed Third Party Offerings; or (ii) issues resulting from or arising out of professional services performed other than by Infor.

e. DISCLAIMER OF WARRANTIES. EXCEPT AS EXPRESSLY PROVIDED IN THIS SECTION 5 OR EXHIBIT A (IF APPLICABLE) NEITHER INFOR NOR ITS THIRD PARTY LICENSORS MAKE ANY OTHER WARRANTIES WHATSOEVER, EXPRESS OR IMPLIED, WITH REGARD TO THE SOFTWARE, SUBSCRIPTION SERVICES OR PROFESSIONAL SERVICES PROVIDED UNDER THIS AGREEMENT. INFOR AND ITS THIRD PARTY LICENSORS EXPLICITLY DISCLAIM ALL WARRANTIES OF MERCHANTABILITY AND OF FITNESS FOR A PARTICULAR PURPOSE. INFOR AND ITS THIRD PARTY LICENSORS EXPRESSLY DO NOT WARRANT THE SOFTWARE OR SUBSCRIPTION SERVICES, IN WHOLE OR IN PART, WILL BE ERROR FREE, OPERATE WITHOUT INTERRUPTION OR MEET CUSTOMER'S REQUIREMENTS.

f. FAILURE OF ESSENTIAL PURPOSE. THE LIMITATIONS SPECIFIED IN SECTIONS 5 AND 9 WILL SURVIVE AND APPLY EVEN IF ANY REMEDY SPECIFIED IN THIS AGREEMENT IS FOUND TO HAVE FAILED OF ITS ESSENTIAL PURPOSE.

#### 6. Confidential Information.

a. Recipient will take reasonable measures designed to prevent the unauthorized use or disclosure of Discloser's Confidential Information, including, at a minimum, those measures Recipient takes to protect its own Confidential Information of a similar nature. Infor will use and disclose Customer's Confidential Information only to its employees, Affiliates, and contractors ("Infor Representatives") and to the extent necessary to further and fulfill the purposes of this Agreement. Customer will use and disclose Infor's Confidential Information only to its Authorized Users and to the extent necessary to further and fulfill the purposes of this

Agreement. The non-disclosure and non-use obligations of this Agreement will remain in full force with respect to each item of Confidential Information for a period of 10 years after termination of any applicable Order Form or Work Order.

b. Recipient shall be responsible for any breach of the confidentiality terms contained in this Section by any of its, in the case of Infor, Infor Representatives and, in the case of Customer, Authorized Users, and shall ensure such Infor Representatives, or Authorized Users, are bound by confidentiality obligations no less restrictive than those herein.

c. If Recipient should receive any legal request or process in any form seeking disclosure of Discloser's Confidential Information, or if Recipient should be advised by counsel of any obligation to disclose such Confidential Information, Recipient shall provide Discloser with prompt notice of such request or advice (if allowed by law) so Discloser may seek a protective order or pursue other appropriate assurance of the confidential treatment of the Confidential Information. Regardless of whether or not a protective order or other assurance is obtained, Recipient shall provide only that portion of Discloser's Confidential Information which is legally required to be provided and use reasonable efforts to assure the information is maintained in confidence by the party to whom it is furnished.

d. If Applicable Law requires a written agreement setting forth the parties' obligations with respect to Personal Data, Infor's Data Protection Addendum for Customers applies to the processing of Personal Data and is incorporated into the applicable Order Form.

#### **7. Indemnity by Infor.**

a. Infor will defend, indemnify and hold harmless Customer and its Affiliates (the "Indemnitees") from and against any loss, cost and expense to the extent arising from a third party claim against the Indemnitees ("Claim") (1) that the Software or Subscription Services infringe any Intellectual Property Rights of others, when used by Authorized Users in accordance with this Agreement; or (2) resulting from disclosure of Personal Data in breach of this Agreement to the extent caused by Infor's breach of the Infor Information Security Plan.

b. Infor's obligations under this Section are expressly conditioned on the following: (1) Customer must promptly notify Infor of any such Claim; (2) Customer must, in writing, grant Infor sole control of the defense of any such Claim and of all negotiations for its settlement or compromise so long as such settlement or compromise does not result in payment of money by Customer or an admission of guilt by Customer; and (3) Customer must reasonably cooperate with Infor to facilitate the settlement or defense of the Claim. If Customer chooses to represent its own interests in any such action, Customer may do so at its own expense, but such representation must not prejudice Infor's right to control the defense of the Claim and negotiate its settlement or compromise.

c. Notwithstanding the foregoing, Infor will not be obligated under this Section to the extent the Claim arises from (1) Customizations; or (2) any Customer deployed Third Party Offerings.

d. If any Software (or Subscription Services) is, or in Infor's opinion is likely to become, the subject of an Intellectual Property Rights infringement claim, then Infor, at its sole option and expense, will either: (1) obtain for Customer the right to continue using the Software (or Subscription Services) per the terms of this Agreement; (2) replace the Software with software (or Subscription Services with services) that is substantially equivalent in function, or modify the Software (or Subscription Services) so that it becomes non-infringing and substantially equivalent in function; or, if (1) or (2) are not available on commercially reasonable terms, (3) terminate the applicable Order Form and refund to Customer the un-used portion of the paid Subscription Fee, if any, for the Software and Subscription Services giving rise to the Claim. **THIS SECTION SETS FORTH INFOR'S EXCLUSIVE OBLIGATION AND LIABILITY WITH RESPECT TO INFRINGEMENT OF INTELLECTUAL PROPERTY RIGHTS.**

#### **8. Term and Termination.**

a. Term. The Initial Subscription Term will be specified in the applicable Order Form. After the Initial Subscription Term, the Subscription Term shall renew for successive one-year Renewal Terms, unless either party provides written notice of non-renewal to the other party at least 90 days prior to expiration of the Initial Subscription Term or then current Renewal Term, as the case may be (Infor will notify Customer at least 30 days prior to the notice period of the Renewal Term and the next Subscription Fee). Except as otherwise expressly set forth in this Agreement, the Subscription Term cannot be terminated prior to its expiration date. Following 10 business days' prior written notice, Infor reserves the right to suspend access to the Subscription Services in the event of any past due Subscription Fees.

b. Right of Termination. If either party breaches any material obligation in this Agreement and/or an Order Form and fails to remedy such breach within 30 days of receipt of written notice of such breach, the other party may terminate the applicable Order Form by providing written notice to the breaching party. If all Order Forms and Work Orders under this Agreement are expired or terminated, this Agreement may also be terminated by a party providing the other written notice of termination. Notice of an alleged Defect does not constitute notice of material breach for purposes of this Section.

c. Effect of Termination. Upon the effectiveness of expiration or termination of an Order Form, Customer's rights to the applicable Software shall immediately terminate. Expiration or termination of an Order Form will not release either party from making payments which may be owing to the other party through the effective date of such expiration or termination. Termination of an Order Form will be without prejudice to the terminating party's other rights and remedies pursuant to this Agreement, unless otherwise expressly stated herein. If an Order Form is terminated due to a breach by Infor pursuant to Section 8(b), Customer



shall be entitled to a refund, on a pro rata basis, of any prepaid Subscription Fees under such Order Form applicable to the unused portion of the then current Subscription Term following the effective date of termination.

d. Transition Assistance. Customer may request services to facilitate the orderly wind down, transition and migration of the Subscription Services under an Order Form from Infor to Customer or Customer's designee pursuant to terms of a mutually agreed to Work Order (the "Transition-out Services"). During the term of Transition-out Services beyond the expiration of any then scheduled Subscription Term, the Subscription Term will renew for up to 12 months pursuant to the terms of this Agreement and applicable Order Form, including pricing.

e. Survival of Obligations. All obligations relating to non-use and non-disclosure of Confidential Information, limitations of liability, and such other terms which by their nature survive termination, will survive termination or expiration of an Order Form or Work Order.

## **9. LIMITATIONS OF LIABILITY.**

a. LIMITED LIABILITY. EXCEPT WITH RESPECT TO THE "EXCLUDED LIABILITIES" (DEFINED BELOW) AND CUSTOMER'S OBLIGATION TO PAY AMOUNTS DUE HEREUNDER, THE TOTAL LIABILITY OF EITHER PARTY AND ITS AFFILIATES AND THIRD PARTY LICENSORS (IN THE CASE OF INFOR), WHATEVER THE BASIS OF LIABILITY, IN CONNECTION WITH OR RELATED TO (1) SOFTWARE OR SUBSCRIPTION SERVICES WILL NOT EXCEED 2 TIMES THE SUBSCRIPTION FEES PAID TO INFOR DURING THE TWELVE MONTH PERIOD IMMEDIATELY PRECEDING THE DATE ON WHICH SUCH LIABILITY FIRST AROSE FOR THE SOFTWARE OR SUBSCRIPTION SERVICES GIVING RISE TO THE LIABILITY AND/OR (2) PROFESSIONAL SERVICES WILL NOT EXCEED 2 TIMES THE PROFESSIONAL SERVICES FEES PAID TO INFOR DURING THE TWELVE MONTH PERIOD IMMEDIATELY PRECEDING THE DATE ON WHICH SUCH LIABILITY FIRST AROSE FOR THE PROFESSIONAL SERVICES GIVING RISE TO LIABILITY.

b. EXCLUSION OF DAMAGES. EXCEPT WITH RESPECT TO THE EXCLUDED LIABILITIES, IN NO EVENT WILL EITHER PARTY OR ITS AFFILIATES OR ITS THIRD PARTY LICENSORS (IN THE CASE OF INFOR) BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, PUNITIVE, OR CONSEQUENTIAL DAMAGES OR DAMAGES FOR LOST PROFITS, WHETHER BASED ON BREACH OF CONTRACT, TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY, OR OTHERWISE, AND REGARDLESS OF WHETHER SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR WHETHER ANY REMEDY SET FORTH HEREIN FAILS OF ITS ESSENTIAL PURPOSE. UNDER NO CIRCUMSTANCES SHALL EITHER PARTY SEEK OR BE LIABLE FOR PUNITIVE DAMAGES.

c. EXCLUDED LIABILITIES. THE TERM "EXCLUDED LIABILITIES" MEANS: (I) INFOR'S INDEMNIFICATION OBLIGATIONS UNDER SECTION 7, EXCEPT AS RELATED TO CLAUSE (II) FOLLOWING; (II) DISCLOSURE OF CONFIDENTIAL INFORMATION IN BREACH OF THIS AGREEMENT RESULTING FROM A PARTY'S ACTIONS, WHICH LIABILITY SHALL BE SUBJECT TO SECTION (d) BELOW; (III) CUSTOMER'S INFRINGEMENT OR MISAPPROPRIATION OF INFOR'S INTELLECTUAL PROPERTY RIGHTS; AND (IV) A PARTY'S WILLFUL MISCONDUCT.

d. UNAUTHORIZED DISCLOSURE OF CONFIDENTIAL INFORMATION. WITH RESPECT TO DISCLOSURE OF CONFIDENTIAL INFORMATION IN BREACH OF THIS AGREEMENT RESULTING FROM A PARTY'S ACTIONS, THE TOTAL LIABILITY OF THE BREACHING PARTY, ITS AFFILIATES AND THIRD PARTY LICENSORS (IN THE CASE OF INFOR), INCLUDING, WITH RESPECT TO INFOR, PAYMENTS PURSUANT TO ITS INDEMNIFICATION OBLIGATIONS, SHALL NOT EXCEED 5 TIMES THE FEES PAID TO INFOR DURING THE TWELVE-MONTH PERIOD IMMEDIATELY PRECEDING THE DATE ON WHICH SUCH LIABILITY FIRST AROSE UNDER THE APPLICABLE ORDER FORM OR WORK ORDER. TO THE EXTENT SUCH BREACH RESULTS IN THE UNAUTHORIZED DISCLOSURE OF PERSONAL DATA, DAMAGES SHALL INCLUDE (1) THE COSTS OF PROVIDING NOTICE TO AFFECTED PERSONS, (2) THE COST OF ESTABLISHING AND OPERATING A CALL CENTER TO FIELD INQUIRIES RELATED TO SUCH UNAUTHORIZED DISCLOSURE FOR UP TO 12 MONTHS; AND (3) THE COST OF PROVIDING CREDIT MONITORING SERVICES TO AFFECTED PERSONS, IN EACH CASE TO THE EXTENT REQUIRED BY APPLICABLE LAW AND ACTUALLY INCURRED.

10. Notices. All notices and other communications required or permitted under this Agreement must be in writing and will be deemed given when sent by overnight courier. Notices to Customer must be sent to its address shown on the signature page of this Agreement, or to such other place as it may subsequently designate in writing. Notices to Infor must be sent to Infor, Attention: General Counsel, 133 Peachtree Street NE, 24<sup>th</sup> Floor, Atlanta, GA 30303 and legalnotices@infor.com, or to such other place as it may subsequently designate in writing.

## **11. Force Majeure.**

a. Neither party will be liable to the other for any failure or delay in performance under this Agreement (including any Order Form or Work Order) due to circumstances beyond its reasonable control, including, without limitation, Acts of God, war, terrorist acts, accident, labor disruption, acts, omissions and defaults of third parties and official, governmental and judicial action not the fault of the party failing or delaying in performance, pandemic, international sanctions, or the threat of any of the foregoing (a "Force Majeure Event").

b. A party seeking to excuse its non-performance as a result of a Force Majeure Event shall have the burden of proof to demonstrate the Force Majeure Event prevents its performance and must, upon becoming aware of a Force Majeure Event preventing its performance, provide written notice to the other party specifying the details in such regard (a "Force Majeure

Notice"). If, within 15 days following a party's provision of a Force Majeure Notice, such party is unable to provide written assurances of its ability to perform in accordance with the Agreement, the other party shall be entitled to terminate the Agreement or suspend its performance thereunder upon providing written notice.

**12. Assignment.** Neither party may assign or transfer any of its rights or obligations under this Agreement, whether by operation of law or otherwise, without the prior written consent of the other. Notwithstanding the foregoing, a party may, upon written notice to the other, and without the other's prior consent, assign or transfer this Agreement (including all Order Forms and Work Orders) to (i) an Affiliate, or (ii) its successor in connection with a merger, acquisition, or sale of all or substantially all of its assets, provided the assigning party is not in breach of this Agreement and such successor has agreed, in writing to the non-assigning party, to assume all obligations of the assigning party hereunder. Any such assignment by Customer must be in its entirety; Infor may assign partially to effectuate a change of control with respect to a product or business line. Any attempted assignment or transfer in violation of the foregoing will be void.

**13. No Waiver.** A party's failure to enforce its rights with respect to any single or continuing breach of this Agreement will not act as a waiver of the right of that party to later enforce any such rights or to enforce any other or any subsequent breach.

**14. Choice of Law; Severability.** This Agreement, and all related disputes and claims hereto, shall be governed by the laws of the State of Delaware, without reference to its conflict of laws provisions thereof. If any provision of this Agreement is illegal or unenforceable, it will be deemed stricken and the remaining provisions of this Agreement will remain in full force and effect. The United Nations Convention on the International Sale of Goods shall not apply to the interpretation or enforcement of this Agreement. Other than with respect to a breach of Section 6 (Confidential Information) or any actual or threatened misappropriation or infringement of Intellectual Property Rights, a party is not entitled to seek injunctive relief.

**15. Usage check.** Infor will check usage of Customer's compliance with this Agreement and Order Forms. If Customer has exceeded the permitted scope of use, then Customer will promptly pay Infor any underpaid Subscription Fees associated with such overuse based on any valid price option then in effect in the Order Form for additional Software usage or, if none, Infor's then current rates for such Software usage.

**16. Independent Contractors.** Infor and Customer are independent contractors under this Agreement, and nothing herein will be construed to create a partnership, joint venture or agency relationship between them.

**17. Insurance.** During the Subscription Term Infor will maintain insurance coverage as described at <https://dam.infor.com/api/public/content/a140f29cc818435786443a746bb5410d?v=cb16ce4b>.

**18. Compliance with Laws.** In relation to the Subscription Services and Professional Services, each party will comply with Applicable Law.

**19. Miscellaneous.** This Agreement together with any Order Form and Work Order, contains the entire understanding of the parties with respect to its subject matter, and supersedes and extinguishes all prior oral and written communications, representations and understandings between the parties about its subject matter. This Agreement shall be construed as if drafted by both parties and shall not be strictly construed against either party. Each party acknowledges that, in entering into this Agreement, it does not rely upon, and shall have no remedy in respect of, any statement or representation of any person other than as expressly set out in this Agreement. Any purchase order or similar document that may be issued by Customer in connection with this Agreement does not modify, supplement or add terms to this Agreement. No modification of this Agreement will be effective unless it is in writing, is signed by each party, and expressly provides that it amends this Agreement. An Order Form or Work Order may be signed by an Infor Affiliate, in which case references to "Infor" in such Order Form or Work Order refer to such Affiliate. This Agreement, any Order Form, or Work Order, and any signed agreement entered into in connection herewith or contemplated hereby may be executed in counterparts. The parties agree that electronically exchanged or stored copies will be enforceable as original documents and consent to the use of electronic and/or digital signatures for the execution of this Agreement and further agree the use of electronic and/or digital signatures will be binding, enforceable and admissible into evidence in any dispute regarding this Agreement.

[Signature Page Follows]



+1 (904) 762-5445  
[Tessa.thomas@inovium.com](mailto:Tessa.thomas@inovium.com)  
[www.inovium.com](http://www.inovium.com)

THE PARTIES have executed this Agreement through the signatures of their respective authorized representatives.

**Infor (US), LLC**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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

Title: \_\_\_\_\_

**Customer:**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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

Title: \_\_\_\_\_

Address for Notices: \_\_\_\_\_

Address for Notices: \_\_\_\_\_

**Exhibit A**  
**(Professional Services)**

Infor's provision of Professional Services is subject to this Agreement, including the additional terms below.

1. **Definitions.**

**"Professional Services"** means the professional services Infor may provide Customer under this Agreement, including any Work Order. Professional Services expressly excludes Subscription Services.

**"Work Order"** means each work order signed by the parties referencing this Agreement, describing the Professional Services to be performed, and the rate(s) therefore.

2. **Work Orders.** Infor may provide Customer with Professional Services as set forth in a Work Order. Infor is under no obligation to perform any Professional Services other than pursuant to a Work Order. However, if Infor performs Professional Services at the direction of Customer and the parties have not signed a Work Order for such Professional Services, such Professional Services shall be subject to all terms and conditions herein and Infor's then current rates for such Professional Services shall apply. Infor may provide Professional Services through its third-party contractors, and is responsible for all their actions.

3. **Scheduling and Cancellation of Scheduled Professional Services.** While Infor will try to schedule Professional Services on the date(s) requested by Customer, Customer should make staffing requests at least four (4) weeks in advance to increase the likelihood the requested date(s) can be reserved. After Professional Services have been scheduled, Customer will be obligated to pay for such Professional Services as if Infor had performed such Professional Services on the scheduled date(s) and any related travel and living expenses to the extent such travel and living expenses are non-refundable, unless Customer has notified Infor at least 14 days prior to the scheduled date(s) that it wishes to reschedule or cancel such Professional Services.

4. **Conditions on Providing Professional Services.** Customer must assign a project manager who will assume responsibility for the management of the project for which the Professional Services are provided. Customer will establish the overall project direction, including assigning and managing the Customer's project personnel team. Customer must provide Infor with such cooperation, information, facilities, equipment and support as are reasonably necessary for Infor to provide the Professional Services. Unless otherwise stated in a Work Order, Infor owns and shall own all proprietary rights to any work product provided as part of the Professional Services under this Agreement, including any Work Order (the "**Work Product**"); however, to the extent such Work Product contains Customer Data or Customer Confidential Information, Customer shall continue to own all proprietary rights in such Customer Data or Customer Confidential Information. Infor grants Customer a non-exclusive, non-transferable license to make a reasonable number of copies of the Work Product for the internal operations of Customer and its Affiliates.

5. **Payment of Professional Services Fees.** Unless otherwise stated in the applicable Work Order, Infor will invoice Customer for all Professional Services Fees and applicable taxes and charges on a monthly basis, as Infor renders the Professional Services or Customer incurs the charges, as applicable. Customer will reimburse Infor for actual travel and living expenses that Infor incurs in providing Professional Services.

6. **Limited Professional Services Warranty and Remedy for Breach.** Infor warrants it will render all Professional Services with reasonable care and skill. If Customer notifies Infor of a breach of the foregoing warranty, Infor will re-perform such Professional Services in compliance with the foregoing warranty. Customer must provide notice to Infor of any warranty claim within 12 months of Infor's provision of the Professional Services that are subject to the warranty claim.

7. **Right of Termination.** If either party breaches any material obligation in a Work Order, and fails to remedy such breach within 30 days of receipt of written notice of such breach, the other party may terminate such Work Order, but may not otherwise terminate this Agreement or the Subscription Term on the basis of such breach. Termination of a Work Order will not release either party from making payments which may be owing to the other party under the terms of the Work Order through the effective date of such termination. Termination of a Work Order will be without prejudice to the terminating party's other rights and remedies pursuant to the Agreement, unless otherwise expressly stated herein.