



## **iVUE Engineering and Operations Product Suite**

Prepared For

**City of Greenfield  
Greenfield, IN**

Monday, December 9, 2019

National Information Solutions Cooperative®

Proposal Prices are valid for 60 days - Expires - Feb 07, 2020

All of our rates are subject to change based on Board resolution.



This confidential Purchase Order is made with an Effective Date of Dec 09, 2019 by and between:

<b>National Information Solutions Cooperative, Inc. ("NISC")</b> Attn: General Counsel One Innovation Circle Lake Saint Louis, MO 63367 <b>Notice Address:</b> Same as above with copy to: <a href="mailto:LegalNotices@nisc.coop">LegalNotices@nisc.coop</a>	<b>City of Greenfield</b>  10 South State Street Greenfield, IN 46140  <b>Notice Address:</b> Same as Above
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1. **Definitions.** Definitions of terms that are used but not otherwise defined in this Purchase Order are set forth in the NISC Master Definitions, a copy of which is available at <https://community.nisc.coop/docs/DOC-36723>

2. **Incorporation of NISC Master Terms and Conditions and/or Software and Service Agreement.** Member's purchase and use of the Software, Services and/or Equipment listed in the attached Schedule 1 is subject to the terms and conditions of the NISC Master Software and Services Terms and Conditions ("NISC Master T&Cs") or the NISC Software and Service Agreement ("NISC SSA"), whichever is currently in effect governing Member's use of all Software, Services and/or Equipment provided to Member by NISC, together with any applicable Additional Terms and Conditions. In the event that Member is not currently, but in the future becomes, subject to the NISC Master T&Cs, Member and NISC agree that Member's continued use of the Software, Services and/or Equipment listed in Schedule 1 shall be governed by the NISC Master T&Cs at such time as Member becomes subject to their terms. Definitions of terms that are used but not otherwise defined in this Purchase Order are set forth in the NISC Master T&Cs or the SSA.

3. **Agreement to Purchase.** Member is placing an order for the Software, Services and/or Equipment listed in the attached Schedule 1, which is incorporated in, and made a part of, this Purchase Order. Member agrees to pay NISC all applicable Charges for such Software, Services and/or Equipment, including but not limited to all Monthly Recurring Fees, Implementation Fees, Third Party Fees, Other Service Fees, Equipment Charges, Costs and Travel Time. Schedule 2 attached to this Agreement, which is incorporated in and made a part of this Purchase Order, is the Statement of Work for the Software, Services and/or Equipment described in Schedule 1 and sets forth the Implementation Services NISC will provide and other related matters.

4. **Binding Agreement.** This is an offer made by Member to NISC and subject to NISC's approval. This Purchase Order and the Agreement will be valid and binding upon the parties when signed by NISC.

5. **E-Execution & Storage:** This Purchase Order may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. This Purchase Order may be executed and/or stored in electronic format only; an electronic, scanned, or facsimile signature shall be valid for all purposes; and the destruction in the ordinary course of business of any document containing a "wet" signature shall not invalidate this instrument.

**National Information Solutions Cooperative, Inc.**

**City of Greenfield**

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

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

Name: Steve Pascoe

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

Title: Manager Business Development E&O

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

Date: December 9, 2019

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

## E&O Cost Summary

Description	Extended Price	Monthly Recurring
IVUE Work Management Solutions - Includes Two (2) Trips	\$ 14,000	\$ 593
Work Management Consulting - Includes One (1) Trip	\$ 9,000	-
<i>E&amp;O Solutions Total</i>	\$ 23,000	\$ 593

Thank you for your continued interest in NISC products and services. This proposal provides a best effort estimation of initial and recurring costs for the implementation and support of the above NISC applications. In order to provide the initial scope used for this proposal, both parties have engaged in mutually beneficial discussions in order to better define the project requirements and to manage risks.

The pricing presented above is based on a complete solution from NISC. Use or procurement of other systems, equipment or software is subject to NISC integration fees and/or hourly installation charges if needed.

By signing, you authorize the purchase of the above summarized solutions including all products and services as referenced throughout this proposal and all terms and conditions cited herein. Please return a signed copy of this authorization to NISC.

Sincerely,

Steve Pascoe

Manager Business Development E&O

Phone: 636.755.2493

Fax: 701.667.1936

Email: [steve.pascoe@nisc.coop](mailto:steve.pascoe@nisc.coop)

## Pricing Estimate

The pricing below is an estimate based on the current number of Agreements which will be adjusted quarterly. Both the Implementation Fee and Monthly Recurring Fees will be billed once the solution is considered live.

Price Estimate	Implementation Fee	Monthly Recurring Fee
Work Management Solutions Software and Support	\$ 14,000	\$ 593
<b>Total</b>	<b>\$ 14,000</b>	<b>\$ 593</b>

## Monthly Recurring Rates

### Work Management Solutions

Work Management Solutions Monthly Recurring Rates are based on the total number of Agreements. Work Management Solutions Monthly Recurring Rates currently are as follows:

Work Management Solutions Monthly Recurring Rates Tier Description	Unit Price per Agreements
Base Monthly Recurring Fee	\$ 200.000
1 - 10,000 Active Accounts	\$ 0.030
10,001 - 25,000 Active Accounts	\$ 0.030
25,001 - 35,000 Active Accounts	\$ 0.020
35,001 - Plus Active Accounts	\$ 0.020

### Work Management Solutions Cost Breakdown Analysis

Item	Description	Qty	Unit Price	Ext. Price	Monthly Maintenance
1	Work Management Solutions Professional Services •Includes Two (2) On-site Trips <sup>1</sup>	1	\$ 14,000	\$ 14,000	\$ -
2	Base Monthly Recurring Fee	1	200.000		200
3	Per Agreements 1-10,000	10,000	0.030		300
4	Per Agreements 10,001 - 25,000	3,100	0.030		93
5	Per Agreements 25,001 - 35,000		0.020		
6	Per Agreements 35,001 - Plus		0.020		
<b>Work Management Solutions Total</b>				<b>\$ 14,000</b>	<b>\$ 593</b>

<sup>1</sup> On-site training will be Monday - Friday during normal business hours. Travel time for on-site training will occur during normal hours Monday - Friday. Travel expenses are estimated at \$1,900 per trip to include hotel, airfare, and meals for on-site resource trips. Travel expenses are invoiced at actual and are not included in the totals listed.

## Project Approach

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### **Statement of Work**

The SOW is a guideline for the work needed to implement this solution. The SOW includes scope, project approach, a description and activities of the purchased products or services, deliverables, and assumptions.

### **Project Management**

NISC manages projects with a blend of methods: Project Management Institute (PMI), and Agile & Adaptive Project Management. An NISC Project Manager will oversee and handle the implementation, and ensure NISC is meeting the timelines and work outlined. This Project Manager will be the focal point of your project and will be your day-to-day contact for this implementation. NISC also expects the Member to have a Project Manager who will manage and coordinate all activities and deliverables that are the responsibility of Member.

## Work Management Solutions

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### **Description & Activities**

NISC's Work Management Solutions alleviates the problem of lost paperwork because service orders and trouble tickets are assigned, retrieved, completed and posted electronically through the Mobile Workforce, SmartTrack and/or AppSuite applications. Utility personnel will optimize efficiency and job satisfaction by enabling the flow of work from the office to the field while utilizing PC and Mobile (Android and iOS) hardware.

NISC's SmartTrack™ allows you to see at a glance your human and non-human resources so you can easily allocate them for maximum productivity, efficiency and customer satisfaction. NISC's SmartTrack™ fully integrates with Customer Care & Billing, Mobile Workforce, and Work Management, which allows you to plan and execute work more efficiently

AppSuite is an IOS or Android solution that integrates to a variety of NSIC solutions including Mobile Workforce. AppSuite extends the power of the iVUE solutions to the field in an easy to use, tablet friendly solution. NISC continues to expand supported iVUE functions into AppSuite which are enabled based on the utility licensing that functionality from NISC such as; NISC's MapWise GIS and Staking, Outage Management (OMS), Time Management and CC&B.

### **Project Scope**

The implementation project plan is established and agreed upon during the project initiation call or kick-off call. SmartSheet is used to deliver the project milestone dates. A typical WMS project from initiation to live date is approximately 7 months. Resource Management is essential in executing a project successfully. NISC will work with the utility to identify the required project resources and project involvement.

Any NISC API's used today to integrate to your 3rd party vendor for the Work Management Solution, the Member will be responsible for notifying NISC to disable this API.

### **Hardware Requirements**

Work Management Solutions hardware requirements can be found at: <https://community.nisc.coop/docs/DOC-20783>

### Training

Depending on the agreed upon plan, travel may be required. NISC provides Work Management Solutions training on-site with three weeks split between analysis, training, and a live week. Travel and training may occur Monday – Friday during normal business hours. Additional training may be provided through web based tools and NISC’s Pathways. If additional training or trips are requested, NISC can provide those at standard hourly rates and expenses and can either be on-site or via Webex. Training for SUPP will be for 3 ½ days at \$450

### Member Deliverables

- Defined workflows leveraging Work Management Consulting
- Mobile Workforce task updates and task commits can be accomplished over a connection as slow as 128kbs. Tasks are typically 5k - 100k in size. When the Mobile Workforce database is synchronized, usually once a day or less, NISC recommends utilizing a high-speed connection.
- If using iVUE Mobile Workforce application a mobile connection is needed and additional VPN Client licenses may be required. If using NISC's supported SonicWall appliances, please contact NISC VPN support staff to verify client license requirements. Please note that NISC does not sell licenses for third party VPN appliances such as Cisco, Netscreen, Watchguard etc.
- Work Management Consulting is typically a pre-requisite for implementing Mobile Workforce and SmartTrack. The one-week consulting service is used to assist utilities in identifying service orders and tasks required to configure workflows. The successful implementation and adoption of Mobile Workforce, SmartTrack and AppSuite is directly dependent on the workflow foundation.
- NISC’s SmartTrack require that your data control records conform to NISC Work Management standards. NISC will complete a comprehensive Work Management assessment to ensure data and processes meet SmartTrack requirements. Results of the assessment may determine the need for additional billable work management consulting and data set-up before SmartTrack can be implemented.
- The utility can leverage additional AppSuite functionality but must be live on the respective NISC iVUE application that AppSuite integrates with.
- AppSuite relies on a data connection to pushed data to and from the application. Wireless internet or cell data communications are the responsibility of the utility.
- AppSuite requires a proxy server and is the responsibility of the utility.
- Support for AppSuite comes from the monthly support your utility is currently paying for the supported solutions. Due to this pricing structure, AppSuite will not integrate with other, third party software.
- We do not anticipate the need to provide training for AppSuite since knowledge of the application being used should be all that is necessary. NISC is not staffed to train employees on the use of iPads or Android products.
- The number of agreements used is a best estimate. Once live, the actual number of agreements will be used and are adjusted quarterly to reflect current agreement counts.
- NISC pricing is approved by a member-appointed Board of Directors and subject to change over time. Labor & travel rates are billed at the current rate during the time of installation.
- We do not anticipate the need to provide training for AppSuite since knowledge of the application being used should be all that is necessary. NISC is not staffed to train employees on the use of iPads or Android products.
- The number of agreements used is a best estimate. Once live, the actual number of agreements will be used and are adjusted quarterly to reflect current agreement counts.
- NISC pricing is approved by a member-appointed Board of Directors and subject to change over time. Labor & travel rates are billed at the current rate during the time of installation.



**Pricing Estimate**

Implementation Fee will be billed once the solution is considered live. The Work Management Consulting Fees are as follows :

Price Estimate	Implementation Fee	Monthly Recurring Fee
Work Management Consulting Software and Support	\$ 9,000	\$ -
<i>Total</i>	\$ 9,000	\$ -

**Work Management Consulting Cost Breakdown Analysis**

Item	Description	Qty	Unit Price	Ext. Price	Monthly Maintenance
1	Work Management Consulting Professional Services	1	\$ 9,000	\$ 9,000	\$ -
	•Includes One (1) On-site Trip <sup>1</sup>				
<i>Work Management Consulting Total</i>				\$ 9,000	\$ -

<sup>1</sup> On-site training will be Monday - Friday during normal business hours. Travel time for on-site training will occur during normal hours Monday - Friday. Travel expenses are estimated at \$1,900 per trip to include hotel, airfare, and meals for on-site resource trips. Travel expenses are invoiced at actual and are not included in the totals listed.

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### **Statement of Work**

The SOW is a guideline for the work needed to implement this solution. The SOW includes scope, project approach, a description and activities of the purchased products or services, deliverables, and assumptions.

### **Project Management**

NISC manages projects with a blend of methods: Project Management Institute (PMI), and Agile & Adaptive Project Management. An NISC Project Manager will oversee and handle the implementation and ensure NISC is meeting the timelines and work outlined. This Project Manager will be the focal point of your project and will be your day-to-day contact for this implementation. NISC also expects the Member to have a Project Manager who will manage and coordinate all activities and deliverables that are the responsibility of Member.

## Work Management Consulting

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### **Description & Activities**

As an added level of functionality, customers have the option to enable work management features available within iVUE CC&B. Work management provides a tailored solution that creates more efficiency in the workplace by introducing resource “action” tasks which bridge the core iVUE system with field resources and workgroups. The work management system is engaged through the use of custom-tailored workflow which provides a system work task blueprint that mirrors actual work process for each activity.

Work management provides electronic “task alerts” that notify responsible parties that work tasks are ready to be assigned, scheduled, and completed through the use of the integrated CC&B work queue. In addition to reducing the reliance on paper orders, the electronic task notification system provides a timely and accurate delivery of required work without having to rely on the time consuming and less accurate method of manually handing-off work between various workgroups. As an added benefit work management also provides users with quick access to inspect current order status through the system instead of having to manually track down the information. These features improve efficiency and accuracy in the workplace and helps avoid re-work and delays.

### **Prerequisites**

Work Management can be used as a stand-alone solution to manage service order workflows however it is a pre-requisite for implementing SmartTrack and iVUE Mobile Workforce/AppSuite solutions. These products require work management workflows to function properly and become an integrated work management solution offering more efficiency and flexibility in managing and completing work tasks in the field. The successful implementation of the SmartTrack, Mobile Workforce and AppSuite are directly dependent on the foundation of work management being in place first. In order to identify the current work management status, an assessment must be performed to determine the amount of work management consulting required to support the need.

### **Work Management Consulting**

Work management consulting services can be provided either on-site or remotely via WebEx/conference call. Based on the customer’s needs and the results of the work management assessment, a work management project plan can be outlined that fits the specific needs of our customer. The following are components of work management consulting and a brief description of each of the items in question.



### **Data Analysis & Preparation**

Data analysis and preparation is performed to make sure that critical work management related data such as resources, workgroups, tasks, service order types, etc. are configured correctly, and documented as a baseline prior to beginning the project. Additional analysis is also performed to provide data clean-up, and also to define any specific data fix requirements that may need attention.

### **Workflow Development**

Workflow development is the specific focus surrounding the creation of work management workflow. The process begins with the documentation of the “as-is” business process for each work activity (service order, or contact reason), and then progresses through the development of the work management workflow with resource or mobile tasks. Once the initial workflows have been created in iVUE the development process concludes with testing and finalizing the workflow(s) in a test environment. The final output is custom-tailored workflow(s) that are ready to be implemented into the live environment. Other Key Objectives include:

- Business process analysis
- Assistance in facilitating the project
- Provide needed worksheets and references
- Provide training and education
- Implementation planning

### **Contact Tracking Set-up & Training**

Contact tracking set-up and training can be provided via WebEx, or alternatively as an on-site program depending on the scope of the customer's needs. This facet of work management provides the customer with the training needed to set-up and use contact tracking to manage customer interactions in their organization. Three levels of contact tracking can be addressed depending on the customer's needs as follows:

- Basic Contact Tracking (contact types, contact reasons)
- Contact Tracking with questionnaire (provides custom open field questionnaire's for specific contact reasons to provide scripted questions)
- Contact Tracking with work management workflow (print tasks, resource tasks, navigation tasks)

### **Task Management Set-up & Training**

This facet of consulting involves the set-up, training, and methods surrounding the management of electronic work management tasks. This effort may be focused specifically on the use of the iVUE work queue, the iVUE SmartTrack or possibly elements of both depending on the needs. Items covered may include:

- Understanding and using task alerts
- Using the iVUE work queue to manage tasks
- Using the iVUE SmartTrack to manage tasks is included in the SmartTrack implementation.
- Transitioning work to and from the field manually. (Mobile setup is included in the Mobile implementation)

### **NISC Deliverables**

- Intentionally left blank

### **Member Deliverables**

- Intentionally left blank

### **Specific Requests**

- Intentionally left blank