



Amendment #1 Finance & Procurement

Date: December 8, 2023

Agreement #: 4441 (Cooperative Purchase via DIR-TSO-4227)

Contractor/Consultant: Vertosoft, LLC

Current Amount: \$1,282,038.40

- I. By execution of this Amendment #1, the parties desire to renew the pavement management software (formerly, Cartegraph) and add new permitting and licensing software to Cooperative Purchase Agreement #4441 ("Agreement"), in accordance with the terms and conditions stated in DIR-TSO-4227, for a term period ending September 30, 2024, with up to three optional one-year renewals.
- II. Attachment A, Scope of Work, to the Agreement is amended by adding **Attachment A-1**, which is attached to this Amendment #1 and incorporated by reference into the Agreement as if fully set out here in its entirety.
- III. Section 2, Scope, of the Agreement is amended by deleting the content of the section in its entirety and replacing it to read as follows: "Contractor shall provide Budget Module Replacement, Pavement Management Software, and Permitting & Licensing Management Software in accordance with the attached quotes and statements of work ("Quotes"), as shown in Attachments A and A-1, respectively, the content of such attachments being incorporated by reference into this Agreement as if fully set out here in their entirety."
- IV. Section 3, Term, of the Agreement is amended by deleting the content of the section in its entirety and replacing it to read as follows: "The term of this Agreement is in three parts, as follows: the term is five years beginning October 1, 2022, and continuing through September 30, 2027, for the software purchase made pursuant to Attachments A and B (budget module); for the continuation and renewal of the pavement management software addressed in Attachment A-1, the term period is March 1, 2024, through September 30, 2024; and, for the permitting and licensing management software purchase made pursuant to Attachment A-1, the term period is January 1, 2024, through September 30, 2024, with three optional one-year renewals (as to the pavement and permitting management module items) to begin October 1 of each option year and continuing through September 30 of the following calendar year, with a final expiration date of this Agreement on September 30, 2027. Subject to sufficient future annual appropriations, the term of the Agreement beginning on and after October 1, 2027, will auto-renew for continuing one-year terms, until either party terminates the Agreement in accordance with the conditions and requirements stated in the Agreement. Any changes and modifications to the scope and/or software products following execution of this Amendment #1 will be memorialized by written amendment and executed by an authorized representative of each party."
- V. Section 4, Compensation and Payment, of the Agreement is amended by replacing only the first paragraph of the section to read as follows: "This Agreement is for an amount not to exceed \$1,486,618.00 subject to approved amendments. All pricing must be in accordance with the

Attachment A-1



Date: 11/29/2023, 12:35 PM

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Leesburg, VA20175 USA

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Fax: 571-291-4119
Email: sales@vertosoft.com

Cage Code: 7QV38
UEI Number Y7D5MXRU2839
DUNS# 080431574
Federal Tax ID: 81-3911287
Business Size: Small Business

Vertosoft Contact: Carly Moore
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OpenGov Quote for City of Corpus Christi, TX

Contract: DIR-TSO-4227

Quote #: Q-04019
Expires On: 12/20/2023

Quote For:
Name: Holly Houghton
Company: City of Corpus Christi, TX
Email: holly@cctexas.com
Phone: 361-826-3753

Ship To
City of Corpus Christi, TX

PAYMENT TERMS	DELIVERY METHOD	PAYMENT METHOD	VERTOSOFT CUST ID	SUPPLIER REF #
Net 30	Electronic	Check/ACH/Credit Card		

Overall POP Start Date: 1/1/2024
Overall POP End Date: 9/30/2027

Term 1

Period of Performance: 01/01/2024 - 09/30/2024

PART #	DESCRIPTION	QTY	CONTRACT LIST PRICE	UNIT PRICE	EXTENDED
OPGV-HAFL-B12B-RR-1Y	Permitting and Licensing - Public Works Permits - Between \$1-2 Billion - 1Y	1.00	113,092.50	\$78,000.00	\$78,000.00
OPGV-HAFP-B12B-RR-1Y	Permitting and Licensing - Supporting Add-On Bundle - Between \$1-2 Billion - 1Y	1.00	47,539.50	\$17,085.75	\$17,085.75

PART #	DESCRIPTION	QTY	CONTRACT LIST PRICE	UNIT PRICE	EXTENDED
OPGV-GHBP-B12B-NR-0Y	Custom Professional Services Deployment - Fixed Fee - Between \$1-2 Billion - 0Y	146.00	272.00	\$232.12	\$33,889.52
Term 1 TOTAL:					\$128,975.27

Term 1

Period of Performance: 03/01/2024-09/30/2024

PART #	DESCRIPTION	QTY	CONTRACT LIST PRICE	UNIT PRICE	EXTENDED
OPGV-CG-OMSP-B12B	OMS Premium	1.00	75,000.00	\$32,729.33	\$32,729.33
OPGV-CG-OMSSI-B12B	Signal Domain (OMS)	1.00	15,000.00	\$6,125.00	\$6,125.00
OPGV-CG-OMSST-B12B	Stormwater Domain (OMS)	1.00	16,875.00	\$9,187.50	\$9,187.50
OPGV-CG-OMSTR-B12B	Transportation Domain (OMS)	1.00	16,875.00	\$9,187.50	\$9,187.50
OPGV-CG-OMSWA-B12B	Walkability Domain (OMS)	1.00	11,250.00	\$3,675.00	\$3,675.00
OPGV-CG-OMSUS-B12B	OMS User (100)	1.00	26,250.00	\$14,700.00	\$14,700.00
Term 1 TOTAL:					\$75,604.33

Term 1 total: \$204,579.60

Term 2

Period of Performance: 10/01/2024-09/30/2025

PART #	DESCRIPTION	QTY		UNIT PRICE	EXTENDED
OPGV-HAFL-B12B-RR-1Y	Permitting and Licensing - Public Works Permits - Between \$1-2 Billion - 1Y	1.00		\$104,000.00	\$104,000.00
OPGV-HAFP-B12B-RR-1Y	Permitting and Licensing - Supporting Add-On Bundle - Between \$1-2 Billion - 1Y	1.00		\$22,781.00	\$22,781.00

PART #	DESCRIPTION	QTY		UNIT PRICE	EXTENDED
OPGV-CG-OMSP-B12B	OMS Premium	1.00		\$56,107.43	\$56,107.43
OPGV-CG-OMSSI-B12B	Signal Domain (OMS)	1.00		\$10,500.00	\$10,500.00
OPGV-CG-OMSST-B12B	Stormwater Domain (OMS)	1.00		\$15,750.00	\$15,750.00
OPGV-CG-OMSTR-B12B	Transportation Domain (OMS)	1.00		\$15,750.00	\$15,750.00
OPGV-CG-OMSWA-B12B	Walkability Domain (OMS)	1.00		\$6,300.00	\$6,300.00
OPGV-CG-OMSUS-B12B	OMS User (100)	1.00		\$25,200.00	\$25,200.00
Term 2 TOTAL:					\$256,388.43

Term 3

Period of Performance: 10/01/2025-09/30/2026

PART #	DESCRIPTION	QTY		UNIT PRICE	EXTENDED
OPGV-HAFL-B12B-RR-1Y	Permitting and Licensing - Public Works Permits - Between \$1-2 Billion - 1Y	1.00		\$109,200.00	\$109,200.00
OPGV-HAFP-B12B-RR-1Y	Permitting and Licensing - Supporting Add-On Bundle - Between \$1-2 Billion - 1Y	1.00		\$23,920.05	\$23,920.05
OPGV-CG-OMSP-B12B	OMS Premium	1.00		\$58,912.80	\$58,912.80
OPGV-CG-OMSSI-B12B	Signal Domain (OMS)	1.00		\$11,025.00	\$11,025.00
OPGV-CG-OMSST-B12B	Stormwater Domain (OMS)	1.00		\$16,537.50	\$16,537.50
OPGV-CG-OMSTR-B12B	Transportation Domain (OMS)	1.00		\$16,537.50	\$16,537.50

PART #	DESCRIPTION	QTY		UNIT PRICE	EXTENDED
OPGV-CG-OMSWA-B12B	Walkability Domain (OMS)	1.00		\$6,615.00	\$6,615.00
OPGV-CG-OMSUS-B12B	OMS User (100)	1.00		\$26,460.00	\$26,460.00
Term 3 TOTAL:					\$269,207.85

Term 4

Period of Performance: 10/01/2026-09/30/2027

PART #	DESCRIPTION	QTY		UNIT PRICE	EXTENDED
OPGV-HAFL-B12B-RR-1Y	Permitting and Licensing - Public Works Permits - Between \$1-2 Billion - 1Y	1.00		\$114,660.00	\$114,660.00
OPGV-HAFP-B12B-RR-1Y	Permitting and Licensing - Supporting Add-On Bundle - Between \$1-2 Billion - 1Y	1.00		\$25,116.05	\$25,116.05
OPGV-CG-OMSP-B12B	OMS Premium	1.00		\$61,858.44	\$61,858.44
OPGV-CG-OMSSI-B12B	Signal Domain (OMS)	1.00		\$11,576.25	\$11,576.25
OPGV-CG-OMSST-B12B	Stormwater Domain (OMS)	1.00		\$17,364.38	\$17,364.38
OPGV-CG-OMSTR-B12B	Transportation Domain (OMS)	1.00		\$17,364.38	\$17,364.38
OPGV-CG-OMSWA-B12B	Walkability Domain (OMS)	1.00		\$6,945.75	\$6,945.75
OPGV-CG-OMSUS-B12B	OMS User (100)	1.00		\$27,783.00	\$27,783.00
Term 4 TOTAL:					\$282,668.25

GRAND TOTAL: \$1,012,844.13

Quote Terms

By purchasing the products and services described in this order form, the Customer is expressly agreeing to the End User Agreement published at <https://www.vertosoft.com/terms-and-conditions-opengov>

Taxes: Sales tax shall be added at the time of an invoice, unless a copy of a valid tax exemption or resale certificate is provided.

Credit Card Orders: Additional fees may apply if paying by credit card.

All Purchase Orders must include: End User Name, Phone Number, Email Address, Purchase Order Number, Government Contract Number or Our Quote Number, Bill-To and Ship-To Address (Cannot ship to a PO Box), Period of Performance (if applicable), and a Signature of a duly Authorized Representative.



Statement of Work

City of Corpus Christi, TX

Creation Date: 7/11/2023
Document Number: PS-04400
Version Number: 2
Created by: Dean Simpson

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1. Overview and Approach

1.1. Agreement

This Statement of Work (“SOW”) identifies services that OpenGov, Inc. (“OpenGov” or “we”) will perform for City of Corpus Christi, TX (“Customer” or “you”) pursuant to that order for Professional Services entered into between OpenGov and the Customer (“Order Form”) which references the Master Services Agreement or other applicable agreement entered into by the parties (the “Agreement”).

- Customer acknowledges and agrees that this Statement of Work is subject to the confidentiality obligations set forth in the Agreement between OpenGov and Customer.
- The Deliverables listed in [Appendix B](#) are the single source of the truth of the deliverables to be provided.
- Customer’s use of the Professional Services is governed by the Agreement and not this SOW.
- Upon execution of the Order Form or other documentation referencing the SOW, this SOW shall be incorporated by reference into the Agreement.
- In the event of any inconsistency or conflict between the terms and conditions of this SOW and the Agreement, the terms and conditions of this SOW shall govern with respect to the subject matter of this SOW only. Unless otherwise defined herein, capitalized terms used in this SOW shall have the meaning defined in the Agreement.
- This SOW may not be modified or amended except in a written agreement signed by a duly authorized representative of each party.
- OpenGov will be deployed as is, Customer has access to all functionality available in the current release.

2. Statement of Work

This SOW is limited to the Implementation of the OpenGov Permitting & Licensing as defined in the OpenGov Responsibilities section of this document ([Section 2.5](#)). Any additional services or support will be considered out of scope.

2.1. Project Scope

Under this project, OpenGov will deliver cloud based Permitting & Licensing solutions to help the Customer power a more effective and accountable government. OpenGov’s estimated charges and schedule are based on performance of the activities listed in the “OpenGov Responsibilities” section below. Deviations that arise during the project will be managed through the procedure described in [Appendix A-2: Change Order Process](#), and may result in adjustments to the Project Scope, Estimated Schedule, Charges and other terms. These adjustments may include charges on a time-and-materials or fixed-fee basis using OpenGov’s standard rates in effect from time to time for any resulting additional work or waiting time.

2.2. Facilities and Hours of Coverage

OpenGov will:

- A. Perform the work under this SOW remotely, except for any project-related activity which OpenGov determines would be best performed at your facility in order to complete its responsibilities under this SOW.
- B. Provide the Services under this SOW during normal business hours, 8:30am to 6:00pm local time, Monday through Friday, except holidays.
- C. Use personnel and resources located across the United States, and may also include OpenGov-trained staffing contractors to support the delivery of services.

2.3. Key Assumptions

The SOW and OpenGov estimates are based on the following key assumptions. Deviations that arise during the proposed project will be managed through the [Appendix A-2: Change Order Process](#), and may result in adjustments to the Project Scope, Estimated Schedule, Charges, and other terms.

General:

- A. Individual software modules are configured based on discussions between OpenGov and Customer.
- B. All training, working sessions, and configuration is completed remotely, unless otherwise specified in appendix
- C. Customer will gather and provide all applicable Prerequisite Data Checklist items prior to the first project working session being held.
- D. Customer's source data will be provided in accordance with [Appendix C: Technical Requirements](#).
- E. Customer will validate and sign off on each deliverable in [Appendix B: Deliverables](#).
- F. Go Live date will be agreed and signed off between the Customer and OpenGov project manager during project planning.
- G. Customer will sign off on the Solution Acceptance prior to Go Live.
- H. The project plan assumes one Go-Live event and cutover unless otherwise specified in [Appendix B: Deliverables](#).

2.4. Exclusions

- A. No historical data migration is included with this scope of work.

2.5. OpenGov Responsibilities

2.5.1. Activity 1 – Project Management

OpenGov will provide project management for the OpenGov responsibilities in this SOW. The purpose of this activity is to provide direction to the OpenGov project personnel and to provide a framework for project planning, communications, reporting, procedural and contractual activity. This activity is composed of the following tasks:

Planning

OpenGov will:

- A. Review the SOW, contract and project plan with Customer's Project Manager and key stakeholders to ensure alignment and agreed upon timelines;
- B. Coordinate a go live planning and data workshop to plan data integrations and migrations;
- C. Maintain project communications through your Project Manager;
- D. Establish documentation and procedural standards for deliverable Materials; and
- E. Assist your Project Manager to prepare and maintain the project plan for the performance of this SOW which will include the activities, tasks, assignments, and project milestones.

Project Tracking and Reporting

OpenGov will:

- A. Review project tasks, schedules, and resources and make changes or additions, as appropriate. Measure and evaluate progress against the project plan with your Project Manager;
- B. Work with your Project Manager to address and resolve deviations from the project plan;
- C. Conduct regularly scheduled project status meetings; and
- D. Administer the Appendix A-2: Change Order Process with your Project Manager.

Completion Criteria:

This is an on-going activity which will be considered complete at the end of the Services

Deliverable Materials:

- Planning and Data Workshop
- Project Plan and Timeline
- Weekly Status Reports
- Go Live Checklist
- RAID
- Project Charter

2.5.2. Activity 2 – Initialization

OpenGov will provide the following:

- A. Customer Entity configuration
- B. System Administrators creation
- C. Solution Blueprint creation
- D. Data Validation strategy

Completion Criteria:

This activity will be considered complete when:

- Customer Entity is created

- System Administrators have access to Customer Entity
- Solution Blueprint is presented to Customer

Deliverable Materials:

- Solution Blueprint
- Sign-off of Initial Draft Solution Blueprint

2.5.3. Activity 3 – OpenGov Use Cases

Use cases:

OpenGov will provide the following:

Public Works: Right-of-Way Permits, Waste/Water Management, etc

Completion Criteria:

This activity will be considered complete when:

- Deliverables are configured/completed

Deliverable Materials:

- Formal sign off document

2.5.4. Activity 4 – Training

Training will be provided in instructor-led virtual sessions unless otherwise specified in Appendix B. For any instructor-led virtual sessions, the class size is recommended to be 10, for class sizes larger than 10 it may be necessary to have more than one instructor.

Completion Criteria:

- Training is provided

Deliverable Materials:

- Formal sign off document

2.6. Your Responsibilities

The completion of the proposed scope of work depends on the full commitment and participation of your management and personnel. The responsibilities listed in this section are in addition to those responsibilities specified in the Agreement and are to be provided at no charge to OpenGov. OpenGov's performance is predicated upon the following responsibilities being managed and fulfilled by you. Delays in performance of these responsibilities may result in delay of the completion of the project and will be handled in accordance with [Appendix A-2: Change Order Process](#).

2.6.1. Your Project Manager

Prior to the start of this project, you will designate a person called your Project Manager who will be the focal point for OpenGov communications relative to this project and will have the authority to act on behalf of you in all matters regarding this project.

Your Project Manager's responsibilities include the following:

- A. Manage your personnel and responsibilities for this project (for example: ensure personnel complete any self-paced training sessions, configuration, validation or user acceptance testing);
- B. Serve as the interface between OpenGov and all your departments participating in the project;
- C. Administer the Appendix A-2: Change Order Process with the Project Manager;
- D. Participate in project status meetings;
- E. Obtain and provide information, data, and decisions within five (5) business days of OpenGov's request unless you and OpenGov agree in writing to a different response time;
- F. Resolve deviations from the estimated schedule, which may be caused by you;
- G. Help resolve project issues and escalate issues within your organization, as necessary; and
- H. Create, with OpenGov's assistance, the project plan for the performance of this SOW which will include the activities, tasks, assignments, milestones, estimates, and duration.

2.7. Completion Criteria

OpenGov will have fulfilled its obligations under this SOW when any of the following first occurs:

- A. OpenGov accomplishes the activities set forth in "OpenGov responsibilities" section and delivers the Materials listed, if any; or
- B. The End Date, as agreed upon between the Customer and OpenGov during project planning, is reached.

2.8. Estimated Schedule

OpenGov will schedule resources for this project upon signature of the order form. Unless specifically noted, the OpenGov assigned project manager will work with Customer Project Manager to develop the project schedule for all requested deliverables under this SOW. OpenGov reserves the right to adjust the schedule based on the availability of OpenGov resources and/or Customer resources, and the timeliness of deliverables provided by the Customer.

The Services are currently estimated to start within two (2) weeks but no later than four (4) weeks from signatures, unless otherwise agreed upon between the Customer and OpenGov, and have an estimated end date of nine (9) months after signatures (“Estimated End Date”). The End Date will be agreed between Customer and OpenGov during project planning.

2.9. Illustrative Project Timelines

The typical project timelines are for illustrative purposes only and may not reflect your use cases.

Illustrative Timeline		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
Data Framework										
Historical Data Migration										
Record & Financial Exports										
Document Migration										
Permitting Licensing and Code Enforcement Suite	Requirements and Discovery									
	Initiate*									
	Configure*									
	Validation^									
Go-Live										
Reporting & Transparency										

*Timeline is dependent on the number of service areas and record types.
 ^Validation includes data integration and migration

OpenGov Configuration
Customer Valida
Go Live Event

2.10. Charges

The Services will be conducted on a Fixed Price basis. This fixed price is exclusive of any travel and living expenses and other reasonable expenses incurred in connection with the Services. All charges are exclusive of any applicable taxes.

Customer shall reimburse OpenGov for reasonable out-of-pocket expenses OpenGov incurs providing Professional Services. Reasonable expenses include, but are not limited to, travel, lodging, and meals. Expenses are billed based on actual costs incurred. OpenGov shall not exceed the estimated \$2500 expenses without written approval from the Customer.

2.11. Offer Expiration Date

This offer will expire on October 7, 2023 unless extended by OpenGov in writing.

Appendix A: Engagement Charter

A-1: Communication and Escalation Procedure

Active engagement throughout the implementation process is the foundation of a successful deployment. To help assess progress, address questions, and minimize risk during the course of deployment both parties agree to the following:

- **Regular communication** aligned to the agreed upon project plan and timing.
 - OpenGov expects our customers to raise questions or concerns as soon as they arise. OpenGov will do the same, in order to be able to address items when known.
- **Executive involvement**
 - Executives may be called upon to clarify expectations and/or resolve confusion.
 - Executives may be needed to steer strategic items to maximize the value through the deployment.
- **Escalation Process:**
 - OpenGov and Customer agree to raise concerns and follow the escalation process, resource responsibility, and documentation in the event an escalation is needed to support issues raised
 - Identification of an issue impeding deployment progress, outcome or capturing the value proposition, that is not acceptable.
 - Customer or OpenGov Project Manager summarizes the problem statement and impasse.
 - Customer and OpenGov Project Managers jointly will outline solution, acceptance or schedule Executive review.
 - Resolution will be documented and signed off following Executive review.
- **Phase Sign-Off**
 - OpenGov requests sign-offs at various stages during the implementation of the project. Once the Customer has signed-off, any additional changes requested by Customer on that stage will require a paid change order for additional hours for OpenGov to complete the requested changes.

A-2: Change Order Process

This SOW and related efforts are based on the information provided and gathered by OpenGov. Customers acknowledge that changes to the scope may require additional effort or time, resulting in additional cost. Any change to scope must be agreed to in writing or email, by both Customer and OpenGov, and documented as such via a:

- *Change Order* - Work that is added to or deleted from the original scope of this SOW. Depending on the magnitude of the change, it may or may not alter the original contract amount or completion date and be paid for by Customer. Changes might include:
 - Timeline for completion
 - Sign off process
 - Cost of change and Invoice timing
 - Amending the SOW to correct an error.

- o Extension of work as the complexity identified exceeds what was expected by Customer or OpenGov.
- o Change in type of OpenGov resources to support the SOW.

A-3: Deliverable Materials Acceptance Procedure

Deliverable Materials as defined herein will be reviewed and accepted in accordance with the following procedure:

- The deliverable material will be submitted to your Project Manager.
- Your Project Manager will have decision authority to approve/reject all project Criteria, Phase Acceptance and Engagement Acceptance.
- Within five (5) business days of receipt, your Project Manager will either accept the deliverable Material or provide OpenGov's Project Manager a written list of requested revisions. If OpenGov receives no response from your Project Manager within five (5) business days, then the deliverable Material will be deemed accepted. The process will repeat for the requested revisions until acceptance.
- All acceptance milestones and associated review periods will be tracked on the project plan.
- Both OpenGov and Customer recognize that failure to complete tasks and respond to open issues may have a negative impact on the project.
- For any tasks not yet complete, OpenGov and/or Customer will provide sufficient resources to expedite completion of tasks to prevent negatively impacting the project.
- Any conflict arising from the deliverable Materials Acceptance Procedure will be addressed as specified in the Escalation Procedure set forth in Appendix A-1: Communication and Escalation Procedure . As set forth in the "Customer Delays" provision of the Agreement, if there are extended delays (greater than 10 business days) in Customer's response for requested information or deliverable; OpenGov may opt to put the project on an "On Hold" status. After the Customer has fulfilled its obligations, Professional Services can be resumed and the project will be taken off the "On-Hold" status.
- Putting a project "on Hold" may have several ramifications including, but not restricted, to the following:
 - o Professional Services to the customer could be stopped;
 - o Delay to any agreed timelines; or
 - o Not having the same Professional Services team assigned.

Appendix B: Deliverables

B-1: Data Deliverables

Master Address Table (MAT) Integration

- OpenGov will:
 - Provide a template file to be utilized by the Customer to populate MAT information.
 - Import the completed template file and validate against the completed template file.
- Customer will:
 - Populate and validate the MAT template.

ESRI ArcGIS Server Integration

- OpenGov will:
 - Integrate with the Customer's ArcGIS public API endpoint.

GIS Flag Integration

- OpenGov will:
 - Provide a template file to be utilized by the Customer to populate GIS Flag information.
 - Import the populated template file after acceptance.
 - Enable the GIS Flag Integration.
- Customer will:
 - Populate and validate the flag template file.

Accounting and Finance Export

- OpenGov will:
 - Provide an export of financial data, based on the Customer's provided format, to the Customer's FTPS as often as nightly.
- Customer will:
 - Agree upon specifications prior to export.

Operational Awareness Record Export

- OpenGov will:
 - Provide up to one (1) Record Export from the customer's OpenGov Permitting and Licensing instance to the customer's OpenGov Enterprise Asset Management instance for operational awareness.
- Customer will:
 - Agree upon specifications prior to export.

B-2: Record Type Deliverables

OpenGov will configure the following standard record type drafts of Customer's record types in the Permitting & Licensing system including Form, Workflow, Output Document and Fees:

Public Works Service Area

Up to three (3) record types:

- Right-of-Way Construction Permit
- Pilot Parklet Permit

- Street Closure Permit

Customer will:

- Attend working sessions to validate, review, and iterate upon draft records.
- Test all configured record types

B-3: Training Deliverables

OpenGov will:

Administrator Training

- Provide up to fourteen (14) hours of Permitting & Licensing system administrator training to enable system administrators on the following topics:
 - Setting up the public portal
 - Employee app settings
 - Creating and editing record types
 - Managing Forms
 - Editing Documents
 - Creating Workflows
 - Setting up Inspections

End User Training

- Provide up to four (4) hours of end-user trainings designed for Plan Review, Inspectors, Finance Staff, etc. to cover the following topics:
 - Navigation of the system
 - Manage inbox and tasks
 - Take payments
 - Conduct inspections
 - Create records

Customer will:

- Identify the relevant participants to attend each training session.

Appendix C: Technical Requirements

Master Address Table

- All addresses must have a unique ID
- Flat file, .csv, .xls, .xlsx, .txt with headers
- Parcels and address points recommended
- Recommended source data: Esri GIS, Alternative source options include: Assessor's database, E911

ESRI ArcGIS

- Publicly-accessible secure ESRI REST API URL

ArcGIS Flags

- Polygon Layer(s) via ESRI REST API URL, Polylines and points are not supported

Financial and Record Exports

- Required format (columns) and sample document

Current application forms, workflows, fee structures, and output documents

- PDF, Word, .csv, .xls, .xlsx with headers