Permitting, Licensing and Inspection Bidder Requirements Response - Cover Sheet

SUMMARY & INSTRUCTIONS: *Type your Vendor / Company Name One on the Bidder Instruction Pages*
The requirements has been set up in a form for bidder response.
The text in this document may not include formatting such as the indented bullet lists, but the text is the same.
Most of this spreadsheet file has been protected. Portions for your response have been left available for editing.
This response must be submitted to The County Procurement in Excel format.

There are multiple tabs containing requirements in this spreadsheet which require response.
Click on any section link below to jump to that tab.

1) RESPONSE
Please complete the RESPONSE column for each requirement row on each of the spreadsheet tabs listed above.
For Business Requirements we are asking you to indicate if your COTS software meets or can be configured to meet the requirement.
For Technical Requirements we are asking you to indicate if your COTS software meet the technical requirement or standard.
Click on the cell to the right of each requirement's text and select a RESPONSE from the drop down list.
The list of possible responses to select from and their definitions is listed on the: Responses tab.
The available response are different for Business and Technical requirements.
Please read the definitions of the responses carefully and select the best answer for each requirement.

2) LEVEL OF EFFORT
If you select TOOL, EXTERNAL or CORE as the response, also select an estimated level of effort.
Read the definitions of the levels of effort carefully: Estimated Level of Effort.
In the appropriate column, select the level of EFFORT that you believe will be required to meet the requirement.

3) NOTES / COMMENTS
At the bottom of each tab's list of requirements there are 10 rows on which you can make comments related
to the requirements in that section. Please specify the requirement number(s) being commented upon.
If you select TOOL as the response to a requirement, please identify the recommended tool(s) here in the comments

There is a limited amount of space available for comments. You can widen the row heights if needed.
The goal is not to have a text explanation of the response to every business requirement.
Please add only important comments which clarify or add significant information to the response.

On the technical requirements tab there is a column available for comments on each requirement row.
Please see the Response definitions to determine what to put in the comments column for technical requirements.

Req #	Requirement Statement	Goals/Notes	Priority	Response	Effort
Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
1.001	Provide a regional - single system solution that will allow multiple municipalities to share the same software platform but with different forms, rules, rates and can deposit revenues into individual municipal bank accounts.	Provide a regional solution for Permits, Licenses and Inspections while preserving an individual municipalities identity and control of operations	Critical		
1.002	Provide each municipality the option to configure the system to issue permits or licenses online based on permit and license type or to require a review by municipal staff before a permit or license is issued to a contractor or customer. There will be differences by community and by particular type and based on the aspects of a particular permit, license or inspection type. These requirements will vary by Municipality using the system.	Maximize the amount of data input by customers online but allow municipalities to retain control of the actual insurance of permits with or without a review as they choose.	Critical		
1.003	Solution provides a single set of Physical databases for the entire region with the ability to accommodate the entire state	**Allow for:** - Single customer/contractor sign on for business across multiple municipalities - Routing and sharing projects between municipalities and/or regional planning agencies - Management information/benchmarking across municipalities - Customer shopping cart that includes permits, licensing and inspections across multiple municipalities - The potential purchase of a single beach sticker for multiple municipalities with revenue splits sent to appropriate municipalities -When a contractor or citizen with business across the region looks at work previously processed or in progress they can see work for the entire region or state	Critical		
1.004	Single Logical database if the vendor does not allow for a single physical database for the entire region with the ability to accommodate the entire state	**Allow for:** - Single end customer sign on for business across multiple municipalities - Routing and sharing projects between municipalities and/or regional planning agencies - Management information/benchmarking across municipalities - Customer shopping cart that includes permits, licensing and inspections across multiple municipalities -When a contractor or citizen with business across the region looks at work previously processed or in progress they can see work for the entire region or state	High		

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Req #	**Requirement Statement**	**Goals/Notes**	**Priority**	**Response**	**Effort**
1.005	Flexible Permits, Licensing and Inspection capabilities for each municipality. Allow each municipality to collect and process the same permit, license and inspection type with different field edit rules, additional data collected not collected by other towns, process flows and other considerations for each municipalities on the same system.		Critical		
1.006	Flexible fee schedules for Permits, Licensing and Inspection capabilities for each municipality. Allow each municipality to charge for its transactions differently than other municipalities while processing on the same system.	Each sub entity / municipality on the system can have its own rates for each permit, license and inspection type.	Critical		
1.007	Revenue distribution -- while using the same system permit, license and inspection revenues must be deposited into the appropriate municipalities bank accounts. Each municipality may have several accounts for different Permit, License and Inspection type. In addition for each Permit, License and Inspection type revenue for accounting purposes may be split between different accounting codes.	Revenues associates with a municipalities parcels should be deposited into the accounts of that municipality.	Critical		
1.008	Capabilities to Copy Configuration of Business Rules, Form Data Collection from both Municipalities part of the Regional Solution and other Vendor customers to speed system configuration and implementation.	Eliminate the need to start from a blank slate to create processes for Municipalities in order to reduce the time to setup and implement the solution.	Critical		
1.009	Allow the possibility of a cross Municipality Beach Sticker that can be used by participating Municipalities. Allow the ability to split revenue based on a formula.	May not be something that is chosen by the region but want to understand if the system is flexible enough to accommodate the concept and the revenue distribution.	Low		
1.010	System must allow for configuration and processing by 351 municipalities within the State of Massachusetts.	The project funding is being provided by the state as a demonstration project with the hopes of being expanded to many more municipalities within the state. The system must be robust enough to accommodate this type of expansion on a single software platform.	Medium		
1.011	Some Municipalities have sub entities within the Municipality that are treated separately. For example one Municipality has 5 different Fire Departments which are not governed by the Municipality. They require their own rules, rates and forms and the deposit of deposits of revenues. Similar separate organizations include Water and Sewer Districts.	Departments that are included in a Municipalities budget are not considered sub entities. The sub entities are separate and apart from the main municipality.	High		
1.012	Allow for a coding structures for Municipalities and Sub Entities in each Municipality that Map to the State Department of Revenue Coding Scheme to allow for easily joining information to DOR information.		Medium		
1.013	Provide access and views to the single system through multiple access points -- each Municipality will link to the system and will setup defaults that will facilitate their customers use of that system. In additional have a Regional and State link to the same website.	Each town will have a link to the Permit, License and Inspection system from their individual websites.	High		

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1.014	Web portal display -- when being accessed from each individual Municipalities website allow for passing a parameter to allow for display of that towns Name and Logo throughout the system.	Have the system appear as though it is the individual municipalities system.	High		
1.015	Shared parcel database -- to facilitate the ability for a contractor to add work for multiple projects in multiple different municipalities to a single shopping cart. Revenues and statistics would be split by which town has jurisdiction over the particular parcel. The business rules, forms and fees will be tied to the municipality that governs the particular parcel.	Provide the benefits of a single system for those customers that do business across multiple towns.	Low		
1.016	Regional Planning Agency - RPA have jurisdiction over certain types of projects. Fees in this situation must be deposited into the RPAs account(s).	Including the RPAs in the same solutions as a Municipal solution will provide transparency for customers relative to all project types and sizes.	Low		
1.017	Provide end customer an option for completing application request forms via an Online - Self Service internet portal- collect all data currently on fill in forms.	Reduce data input and scanning by Town Staff, increase MIS Reporting capabilities	Critical		
1.018	For customers not using self service internet portal facilitate the **rapid point of sale processing for customers at municipal counters**	Facilitate the municipalities working with customers at the counter - non self service customers by allowing for a streamlined data input and fee calculation capability.	Critical		
1.019	Share common data across multiple forms related to a single permit or license to reduce data input	Reduce data input by customer and Town Staff	High		
1.020	For municipal staff require input of essential information only for rapid point of sale transactions - will scan forms for those still using the counter or perhaps data input the rest of the data later.	Allow for quickly handling customers at the counter.	Critical		
1.021	Online - Self Service permit or license applicants have the ability to pay for Permits, Licenses, Inspections, etc. Online	Reduce manual payment processing provide payment flexibility for customers	Critical		
1.022	Municipalities must have the configuration choice to have the credit card and EFT/ACH processing company charge a convenience fee to the customer or have the fees charged to the Municipality.	If the fee is charged to the customer the Municipalities revenues will not be decreased. If the fee is absorbed by the Municipality there will be no disincentive to the customer using the online option. But this will be the choice of the individual municipality	Critical		
1.023	Provide an Express Permit concept for simple Building projects can be processed for less complicated projects.	In some communities 80% or more of the building permits are for Window Replacements, Door Replacements, Re-Siding, Re-Roofing, Sheds, Wood Stove, Tents and other basic projects not requiring as much scrutiny. If the project is in Historic Districts (GIS Check) then like for like materials may be used without as much scrutiny as other projects. Allow for online submission, GIS Checks for Historic and Conservation implications, and subsequent approval by Building, Health (sheds vs. Septic, Historic , Water (sheds vs. Water Lines), Conservation (sheds vs. conservation impact, etc.)	High		

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1.024	Provide permit or license applicants have the ability to attach documents / images to self service - internet application submission	Reduce scanning by Town Staff, allow for online processing for example the electronic receipt of a Rabies Certificate will allow for online Dog License Renewals, Vehicle Registrations required for Beach and Disposal Stickers - facilitate paper reduced environment	Critical		
1.025	Document Management Capability as part of product or with interfaces to document management systems such as Laser Fiche. These requirements must be configurable by Municipality using the system as some may have a document management system while other will use the Vendor document capability.	Facilitate a paper reduced environment and one which allows for online and internal access to documents associated with parcels, licenses, permits, inspections, etc..	Critical		
1.026	Allow a municipalities **customers to view document images related to their parcels**	Reduce calls and provide 24 x 7 access to documents	High		
1.027	Provide ability to store correspondence for internal only or for external viewing to maintain a record of correspondence. Allow for the storage of documents as a part of document creation -- minimal if any steps to store documents.	Maintain electronic correspondence records and minimize work required to store documents.	High		
1.028	Provide Municipal staff document annotation via built in Document Management Capability or by using a 3rd party document management capability like Laser Fiche - redaction and limiting the viewing of whole documents by only those authorized	Secure Sensitive from being viewed by the public via the Self Service Internet Portal. For example block out a social security number from being displayed on the internet.	High		
1.029	Capability for a customer or staff to upload plan documents, compare one version of a plan document to another version of the document and highlight the changes between the version of the plan.	Reduce the need to manually check different plan versions.	Medium		
1.030	Allow ability to redact sections of images and/or make certain images private to prevent outside viewing of certain private documents.	Publish only the appropriate information via the web	High		
1.031	Customer has option of checking Status Online of Permits, Licenses, etc. whether or not they initiated the process via the Web	Reduce calls	Critical		
1.032	Provide Flexible Business Rules which can be different for each municipality. For example some communities may have each department provide approvals prior to starting the clock on the Building Department Approval while another Municipality may start the process in Building and then get approval from other departments -- the system must accommodate various business rules on the same platform for the same process but different for each municipality	Flexible system rules and sub entity structures allow for different business rules for each municipality while using the same system platform	Critical		

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1.033	Business Rules allow for use of data from other system or input by customer to make judgments on the ability to process business without intervention, route to various departments or other workflow requirements.	**Example - Unpaid Bill and Residency Check:** A license requires no unpaid taxes and proof that the applicant is a resident: - Check for unpaid taxes at the location, collect additional data or stop at the end of the process until payment is received. - For disposal or beach sticker check residency by taking a motor vehicle registration and look at motor vehicle tax records to determine vehicle garaging. - If the vehicle test fails check for in town parcel ownership. - If parcel ownership fails check for valid utility bill -If an automated residency check other than Motor Vehicle passes request the customer to scan and e-mail, fax or mail in a vehicle registration. - If all residency checks fail request the applicant to scan and attach, fax or mail proof of residency or come to town hall with the application number to speed their way at town hall.	Critical		
1.034	Permit, License and Complaint **Status Tracking** by Staff and Customers	Manage and measure process	Critical		
1.035	Plan Review Tracking	Manage and measure process	Critical		
1.036	**Customers / contractors ask and system routes questions to appropriate inspector via the web** and associate correspondence with applications / parcels when appropriate.	Reduce the need for inspectors to be in the office to handle questions.	Medium		
1.037	Allow for collection of **citizen's reporting violations or complaints via the Web** - give option for anonymous or require names and phone numbers, associate with parcel if appropriate, automatic routing based on complaint type	Reduce calls, allow for automatic routing to correct department, produce MIS, etc. More details in Service Orders-Complaint Tracking	Medium		
1.038	Automated Workflow - show inbox type capability to indicated who must complete the next step in the process (**Interdepartmental Tracking**)	Automatically direct info to appropriate person to reduce manual routing	Critical		
1.039	Automatic Document Distribution without Leaving the System	Alert staff to review a particular document	High		
1.040	Automatic Task and Expiry Date Reminders (include contractor insurance and license expirations)	Automated Reminders automatically remind staff of approaching deadlines for applications or to perform specific tasks.	High		
1.041	Problem Flag Tracking	Tracking of Problem-Flags allows staff to flag applications and documents which require additional attention, helping to prevent premature final approval.	Critical		
1.042	Sign Off Tracking	Tracking of sign-offs allows staff to determine which departments or individuals have signed-off on applications or documents and which have not.	Critical		

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1.043	For walk in customers allow the process to be started by any department	Some municipalities start the permit process in the Building department. Others start the process in the other departments that require signoff so the clock for the Building department does not start until the other signoffs are completed. The system must accommodate either approach.	High		
1.044	For walk in customers allow the sign off to be done based on configuration rules. For example the last sign off department might be building or licensing for a particular permit or license.	Again allow flexibility in configuring how the system workflow occurs in any particular municipality.	High		
1.045	Allow export of revenues collected by Department to a format to allow Import into Financial Management systems like Munis, Vadar, Softwright, Data National, etc. For example using Munis allow for use of **Munis Miscellaneous Cash Receipts Import. Also allow for ODBC or other capability to push data into the Financial Mgmt. system.**	Eliminate duplicate data input and reduce errors	High		
1.046	**Fee Calculations** - allows for table driven adjustable / flexible fee calculations these calculation and fees will vary by municipality using the system	Speed the computation and accuracy of fees both by in-house staff and customers online	Critical		
1.047	Ability to Collect Miscellaneous Cash not Associated with a Specific Automated Process - have all dollars received for the department process through 1 system	Process all dollars received by one department through 1 system if not already automated by the overall financial management system.	Low		
1.048	Credit Card processing must be PCI Compliant to ensure the confidence end customers have with transacting business online with the system.		Critical		
1.049	Abutters List Generation -- list properties connected to a property in question or within a radius of the particular property.	Produce a list of surrounding properties to the parcel in question. In addition produce a sheet of labels so that mailings can be done to the abutter as well as a sign off sheet for the Assessor so the can indicate they approve the abutters list	Medium		
1.050	Adaptable / Flexible Reports using vendor tools.	Allow for easy report generation - more detail in reporting.	Critical		
1.051	Allow for **custom reporting** using the vendor's report generation tools.	Allow for easy report generation - see reporting tab for more details	Critical		
1.052	Allow for **custom reporting** using Crystal Reports/Business Objects or other reporting services (ODBC or direct interface to Database Management System).	Allow flexibility in reporting in combination with other Town Systems - see reporting tab for more details	High		
1.053	Allow for export of report data from Vendor reports to various formats including PDF, Excel and CSV.		Critical		
1.054	To facilitate for example a Rental Certification / Inspection program each parcel may be associated with one or more rental / housing units. Typical municipal Assessor and GIS systems do not have a sub level below the Map/Lot or Building level. The vendor system will need to supply a database structure that identifies a rental unit layer below the Map/Parcel or Building level.		High		

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1.055	Ability to send mass e-mails or letters indicating an upcoming renewal is required for a permit, license or inspection. Provide a link to the web service for payments, scheduling inspections, etc. (Mail merge type capability). Automatically resend if not renewed or action is not initiated within a certain period of time.	Reduce manual activity associated with this function and direct customers to Web Self Service Capabilities	High		
1.056	Similar to other License, Permit and Inspection items inspections should be scheduled based on a flexible frequency which may be different for each community. For example a community may collect a Rental Certification fee each year but inspect properties on a 3 year cycle. Customer will pay for and schedule inspection via an online system.		High		
1.057	The system provides Mobile Applications for use by Citizens	Provide the ability for citizens to use mobile apps on phones or tablets.	Medium		
1.058	The system provides tool kits or SDKs for a municipality to modify or build their own mobile applications.	Allow the region to modify mobile apps for use by citizens and employees.	Low		
1.059	Allow Municipalities to override issues with data contained in outside / state databases. For example a contractor has a valid registration not yet reflected in the state database.	Eliminate holding up a permit or license if data in a State database is incorrect.	High		
1.060	Synch with Parcel Data from **Vision, Patriot, PK and other Appraisal Systems** either via ODBC, Web Connect or scheduled import of data via automatic job. Allow for **Parcel Based Permitting**.	Reduce duplicate data input and errors associated with the Permit, License and Inspection systems parcel information not being in synch with Assessing data.	High		
1.061	Import or link to and display and use in rules past due info from Munis, Vadar, Softright and other Financial Management system commonly used in Massachusetts by ODBC link, Web Connect, scheduled import via automatic job files or other automatic mechanism to reduce manual intervention in the process.	Reduce manual process of reviewing paper records to determine those that cannot take out a permit or license because they have not paid their taxes or other fees. Configurations must be designed so they are repeatable for like systems at minimal if any incremental additional costs for other towns in the region or state that will join onto this system.	High		
1.062	Import, Web connect or other mechanism to one way synch to the **State Contractor Registration File** (contractor license status, name address, etc. merge using license or other tracking number).	Reduce duplicate data input, errors and the need for customers to provide information or perform edit checks using data already in government databases. Example of data can be found at state public information web reporting site: http://services.oca.state.ma.us/hic/licenseelist.aspx	High		
1.063	Import, Web connect or other mechanism to one way synch to the **Worker Compensation Insurance** tracking information (contractor Worker Comp insurance, status, name address, etc. merge using insurance or other tracking number).	Reduce duplicate data input, errors and the need for customers to provide information already in government databases. Example of data can be found at state public info web reporting site: http://64.73.26.43/Disclaimer.aspx	High		
1.064	Import, Web connect or other mechanism to one way synch to the **Alcoholic Beverage Control Commission** tracking information (verify for business licensing that a business has a current state license using tracking or license number).	Reduce duplicate data input, errors and the need for customers to provide information already in government databases	Medium		

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1.065	Import, Web connect or other mechanism to one way synch to the **State Environmental Protection system for** tracking information (link to data input by customer to the EPA website for various determination required of local municipalities.)	Reduce duplicate data input, errors and the need for customers to provide information already in government databases	Medium		
1.066	Allow Municipalities the ability to add or modify import, ODBC, Web connect or other system interfaces to pull external data into the system.	Reduce system maintenance and enhancement expense.	High		
1.067	Customer Request / Suggest Appointment Schedules	Reduce calls associated with having to manually make scheduled appointments.	High		
1.068	**Allow option of updating inspection information in the field** using laptops, tablet PCs, PDAs and/or Cell Phones. Using wireless communications capabilities.	Reduce the need for inspectors to be in the office, reduce duplicate data input, provide information which may allow customers to proceed to the next step in construction or other activities more quickly saving customers time and money.	High		
1.069	Allow the ability to store and forward / synch with the inspection solution when Wi-Fi or Cellular signals are not available.	Allow for an ability to conduct field work in areas with no or poor wireless connection capabilities.	High		
1.070	Inspector Recommended Field Hardware will work with a 700 MHz spectrum devices to be put in place throughout the region.	Allow for low cost high bandwidth wireless communications to the Vendor solution.	Low		
1.071	Allow ability to use Municipal / State of Massachusetts Coding for Construction Types, etc.	Compatibility with Existing process	Critical		
1.072	Maintain inspector calendars in order to block time inspector's are already committed to time off, meetings and other inspection activities.	Facilitate online booking of inspections by end customers with consideration of the dynamic nature of an inspector's calendar.	Critical		
1.073	Allow available inspector scheduling to block available time by geographic section of Municipality to allow for inspectors to concentrate certain activities on particular days to a particular geographic area.	Maximize inspector productivity and reduce travel time as is appropriate by making only certain sections of the municipality available for certain types of inspections when allowing online scheduling by end customers.	Medium		
1.074	Link inspector schedules to town calendar software to maintain a view of an inspector's schedule in both town and vendor system.		High		
1.075	Allow for flexibility in a particular communities ability to either allow customers to book an appointment online or only to select a desired inspection time with the communities responding back to confirm whether or not the desired inspection time.		High		
1.076	Allow for mass e-mail to customers if an inspector must cancel appointments. In addition, allow for reporting of a contact list to allow for phone contact of customers.		High		
1.077	Record votes related to Permits, Licenses, Variances, Complaints brought before the Board or Commission. Attach documents and record variance or licenses decisions. Link variances, license approvals and other decisions to the property and/or business associated with the decision.	Facilitate the hearing process for various Boards and Commissions	High		
1.078	Interface with GIS information from Towns. Interfaces will include GIS systems, collection of shape files and GIS related .CSV files	Integrate GIS with Permit, Licensing and Inspection Process	Critical		

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1.079	Online GIS viewing for customers submitting or reviewing information via the Web	Reduce calls	High		
1.080	Ability for GIS maps highlighting/Red-lining/mark-ups	Provide a way for the Town and the Public to be able to seamlessly and directly access Live GIS data and maps, and to be able to annotate these maps as a part of the review process by adding comments, highlights and utilizing basic sketching tools to relay additional information appropriate to the review process. Though this information may ultimately be incorporated into the GIS database, that is not our intent with this requirement.	High		
1.081	Use data contained in the solutions database to highlight certain parcels to dynamically provide GIS layers.	Provide GIS layer views without the need for a GIS professional to setup the layers. Have some layer views driven by elements contained in the vendors database.	Medium		
1.082	Option to Standardize / CASS certify mailing address information (reconcile to US Post Office Standards) or options to standardize to the Federal Geographic Data Committee location address standards.	Reduce postage cost increase effectiveness of mail delivery -- standardize and make addressing consistent	Medium		
1.083	Each individual Municipality would own their data and would have the right to leave the platform and use the data to move to another platform.		Critical		
1.084	Conversion from like system to the new vendor system must be repeatable with little if any additional design cost except for dealing with variation of different versions	Conversion from like system to the new product must be planned to do the same for similar systems in the region or the state.	Critical		
1.085	Allow for Municipalities the ability to configure e-mail, web displayed or paper documents output by the system to allow for tailoring without the need to utilize vendor support to accomplish these changes or new documents.	Reduce system maintenance expenses.	Critical		
1.086	When municipality needs new permit or license types or modifications to existing types have the ability for Municipal employees to use system tools to accommodate new types or have Vendor do it as part of the Maintenance Agreement	Accommodate future changes at low or no cost.	High		
1.087	Vendor will develop the data entry screens, coding scheme and output documents as part of the initial software / services / installation / setup fee	Speed the system roll-out process -- see implementation requirements for details	Critical		
1.088	Have a process in place that allows Municipalities to communicate with existing vendor Municipal Clients to locate business rules, forms and processing that are similar to those to be put in place.	Eliminate the need to start from a blank slate to create processes for Municipalities in order to reduce the time to setup and implement the solution.	Critical		
1.089	Facilitate regional chargebacks for license fees and maintenance by reporting on the number of licenses in place for each municipality.	Allow the region to identify the amount of dollars to be charged back to each municipality for the single system solution.	Critical		
1.090	Have in place best practice templates and materials for use to review and implement if appropriate from the templates.	Eliminate the need to start from a blank slate to create processes for Municipalities in order to reduce the time to setup and implement the solution.	Critical		

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1.091	Ability to link to local By-laws / codes	Provide a hyperlink to town specific By-laws / codes	Medium		
1.092	Provide the ability to display Calendar of Events / Scheduling of certain permits types that would involve- Road closures, Housing Moves, Special Events, etc. including displaying information using GIS to illustrate potential impacts to traffic or useful information about the location of special events.	Provide citizens and staff the ability to see when certain events may affect plans for travel, require additional town resources, etc. Or may provide information on events to attend. Show the events on a calendar. Allow for clicking on the calendar to display a map. If available show a day view including times. Allow for clicking a GIS map for a particular time. Allow for showing all events or filtering by type of event such as Yard sale permits, Burn Permits, etc.	High		
Req #	**Bidder Comment / Note About Response Above**				

Req #	Forms from Customers, Outputs to Customer or Others Requirement Statements Related to Departments	Goals/Notes	Priority	Response	Effort
Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
2.001	**Building Department Forms - Applications**		Critical		
2.002	1 and 2 Family Permit		Critical		
2.003	Aquifer Protection Bylaw		Medium		
2.004	Certificate of Inspection Application		Critical		
2.005	Clearing Permit		Medium		
2.006	Commercial Building Permit		Critical		
2.007	Complaint Form	Described in detail in the service order / work order section.	Medium		
2.008	Construction Control Document		High		
2.009	Electrical Permit		Critical		
2.010	Elevation Certificate		High		
2.011	Express Permit	High volume of transactions that allow for a one page application related to Window, Roof, Door, Siding and other work routine work.	High		
2.012	Lot Inquiry Form		Medium		
2.013	Mass Checklist for Compliance	Display overall checklist to the customer -- can be done via the Towns website if not available through a vendors product. Business and workflow rules in these checklists should be incorporated in the product as Critical.	Low		
2.014	Mechanical Permit		High		
2.015	Motel Use Inquiry Form		Medium		
2.016	Multi-family Certificate of Inspection Application		Medium		
2.017	Plumbing Permit Application		Critical		
2.018	Re Inspection Form		High		
2.019	Shed Permit		Critical		
2.020	Sign Application		High		
2.021	Sign Code	Display overall checklist to the customer -- can be done via the Towns website if not available through a vendors product. Business and workflow rules in these checklists should be incorporated in the product as Critical.	Low		
2.022	Trench Permit		Critical		
2.023	Zoning Determination for Business		High		
2.024	**Building Dept. Documents Provided to Customers**		Critical		
2.025	Certificate of Inspection		Critical		
2.026	Demolition Sign Off		Critical		
2.027	Issued Permit		Critical		
2.028	**Building Dept. Reports - Form Letters**		Critical		
2.029	FW Dodge Report		Critical		
2.030	Building Permit Counts		Critical		
2.031	Plumbing & Gas Permit Counts		Critical		
2.032	Electrical Permit Counts		Critical		
2.033	Family Related Apartment Letter		Critical		
2.034	Multi-Family Inspection Cover Letter		Medium		
2.035	**Building Permit Functional / Charge Type Breakdowns - Duplicate / reformat of forms listed above.**		Critical		
2.036	New Dwelling Unit	Different Fees 1-2 Family vs. Multi Family vs. Other/ Commercial (Deposits apply if not paid in full)	Critical		
2.037	Additions	"	Critical		
2.038	Alterations	"	Critical		
2.039	Garage Under House	"	Low		

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Req #	**Forms from Customers, Outputs to Customer or Others** **Requirement Statements Related to Departments**	**Goals/Notes**	**Priority**	**Response**	**Effort**
2.040	Garage Attached or Detached	"	Critical		
2.041	Deck and Open Porch	"	Critical		
2.042	Sheds up to 150 Square Feet	"	Critical		
2.043	Sheds over 150 Square Feet	"	Critical		
2.044	Roofing	"	Critical		
2.045	Siding	"	Critical		
2.046	Combination Roofing & Siding	"	Critical		
2.047	Foundation Only	"	Medium		
2.048	Foundation Only with Rebar	"	Medium		
2.049	**Misc. Building Permit Related Fees**		Critical		
2.050	Buildable Lot Inquiry / Determination		Medium		
2.051	Multifamily Inquiry / Determination		Medium		
2.052	Zoning Determination Request (written)		Critical		
2.053	Swimming Pools	Different Fees for Commercial vs. Residential Above and in Ground	Critical		
2.054	Exterior Hot Tub		Medium		
2.055	Fireplaces	Different Fees Masonry vs. Manufactured	Critical		
2.056	Solid Fuel Appliances (Wood or Coal)		Critical		
2.057	Chimney Only		Critical		
2.058	Certificate of Occupancy for Change of use for Occupancy not involving construction		Critical		
2.059	Tents	Diff Fee Residential vs. Commercial	High		
2.060	Carnivals		Medium		
2.061	Mechanical Per Unit of Equipment - Commercial		High		
2.062	Building Permit Extension		High		
2.063	Temporary Construction Trailer		Critical		
2.064	Temporary Mobile Home		High		
2.065	Demolition		Critical		
2.066	Demolition - Accessory Bldg.		Critical		
2.067	Replacement of Lost Inspection Card		Critical		
2.068	Permit Transfer		Critical		
2.069	**Plumbing & Gas Permits**		Critical		
2.070	Plumbing		Critical		
2.071	Gas Permit		Critical		
2.072	Gas Water Heater Replacement		Critical		
2.073	Re-Inspection Fee		Critical		
2.074	**Electrical Permits**		Critical		
2.075	Temporary Service	Diff fee residential vs. commercial	Critical		
2.076	Dwelling Unit	Addl fee for addl units	Critical		
2.077	Re-Inspection Fee		Critical		
2.078	Additions/Alterations	Permit price based on square foot range	Critical		
2.079	New and Replacement Service		Critical		
2.080	Fire Alarm or Security System	Addl fee for addl units, diff fees residential vs. commercial	Critical		
2.081	Power Limited or Communication System		Critical		
2.082	Swimming Pools or Fountains	Diff fees residential vs. commercial and rebar grounding combination	Critical		
2.083	Rebar bonding (grounding) only	Diff fees residential vs. commercial	Medium		
2.084	Annual Maintenance Permit		Medium		
2.085	Carnivals or Fairs		Medium		
2.086	Single Inspection Fee - inspections not covered by fees above.	Diff fees residential vs. commercial	Critical		
2.087	**Health Department - Applications**		Critical		
2.088	21E (Environmental) Request Form		High		
2.089	Appl for Reimb (Health & Env) Request Form		Medium		
2.090	Commissary-Catering Temporary Food Service Application		High		
2.091	Disposal Installer Application (Title V)		High		
2.092	Funeral Director License Application		Medium		

	Forms from Customers, Outputs to Customer or Others				
Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
Req #	Requirement Statements Related to Departments	Goals/Notes	Priority	Response	Effort
2.093	General Business License Application (for food, lodging and retail)		Critical		
2.094	Haz Mat Application		Medium		
2.095	Mobile Food Application		High		
2.096	Poultry License Application		Medium		
2.097	Recreational Camp License Application		Medium		
2.098	Refuse Collection and Transportation Application		Medium		
2.099	Rental-Lease Registration		High		
2.100	Sewage Collection and Transportation Application		High		
2.101	Sheep, Goats License Application		Medium		
2.102	Stable License Application		Medium		
2.103	State Workers Compensation Insurance Affidavit Form	Link to state database for information.	High		
2.104	Tanning Application		High		
2.105	Tattooing - New		Medium		
2.106	Tattooing - Renewal		Medium		
2.107	Temporary Food Service Application		High		
2.108	Title 5 Deed Restriction Application		Critical		
2.109	Flu Clinic Fees		High		
2.110	**Health Department - Licenses Provided to Customers**		Critical		
2.111	Animal License		Medium		
2.112	Cabin License		Medium		
2.113	Camp License		High		
2.114	Common Victualler License		Critical		
2.115	Continental Breakfast License		High		
2.116	Disposal Installer License		High		
2.117	Food Services License		Critical		
2.118	Food Vending Machine License		Medium		
2.119	Frozen Desert License		Medium		
2.120	Funeral Director License		Critical		
2.121	Inn holder B-B License		Critical		
2.122	Lodging House License		Critical		
2.123	Mobile Food Service License		High		
2.124	Motel License		Critical		
2.125	Non-Profit Food Service License		High		
2.126	Poultry License		Medium		
2.127	Refuse Collection License		High		
2.128	Residential Kitchen License		High		
2.129	Retail Food Ser > 25K Sq Ft		High		
2.130	Retail Food Ser < 25K Sq Ft		High		
2.131	Retail Food Ser > 50K Sq Ft		High		
2.132	Sewage Collection License		High		
2.133	Swimming Pool License		High		
2.134	Tanning License		High		
2.135	Tattooing Business License		Medium		
2.136	Tattooing Practitioner License		Medium		
2.137	Temporary Food Service License		High		
2.138	Tobacco License		High		
2.139	Trailer Park License		High		
2.140	Whirlpool License		High		
2.141	Wholesale Food Serv License		High		
2.142	Well Installation Permit		High		
2.143	**Health Department - Inspection Checklists**		Critical		
2.144	Food Establishment Inspection Form		Critical		
2.145	Hazardous Materials Inspection Form		High		
2.146	Pool Inspection Form		Critical		
2.147	Rental Housing Inspection Form		Critical		

Req #	Forms from Customers, Outputs to Customer or Others Requirement Statements Related to Departments	Goals/Notes	Priority	Response	Effort
Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
2.148	**Fire Department - Applications / Permits**	Provide notification to the Building Department when Fire Department does an inspection with Building Department implications - example Security/Smoke or other installation requiring an electrical permit	Critical		
2.149	Install Oil Burning Equipment / Tanks		Critical		
2.150	Install Fire Alarm System 527 CMR 10:03 (15)		High		
2.151	Burning Permit MGL C 148 527 CMR10.00		Critical		
2.152	Install F/A-C/O System 527 CMR 10:03 (15) & CMR 31:00		High		
2.153	Repair Fire Alarm System 527 CMR 10:03 (15)		High		
2.154	Install Propane Tank		Medium		
2.155	Install Kitchen Hood Suppression		Medium		
2.156	Install Sprinkler System 527 CMR 10:03 (15)		Medium		
2.157	Repair Sprinkler System 527 CMR 10:03 (15)		Medium		
2.158	Tank Truck Inspection 527 CMR 14:03 (1)		High		
2.159	Underground Tank Removal Chapter 148 sec 38A		High		
2.160	Waste Oil Storage Tanks		High		
2.161	Unvented Gas Heater Installation 527 CMR 30:04		High		
2.162	Cutting & Welding Permit 527 CMR 39:04		Medium		
2.163	Ceremonial Bonfires 527 CMR 10:23 (1)		Medium		
2.164	Install Carbon Monoxide Alarms CMR 31.00		High		
2.165	Combustible Storage > 2,500 Cu. Ft. 527 CMR 10:03		High		
2.166	Flammable Decorations 527 CMR 21:02 (6)		Medium		
2.167	Shutdown Sprinkler / Alarm Chapter 148 sec 27A		Medium		
2.168	Fireworks &/or Spec. Effects 527 CMR 2:04 (3)(C)(9)		High		
2.169	Fumigation Operation 527 CMR10:06 (2)		Medium		
2.170	Hazmat unattended 527 CMR 25:08		Medium		
2.171	Install Fire Suppression System / Service Station		High		
2.172	Installation of LPG tanks 527 CMR 6:08		Medium		
2.173	Storage of LPG 527 CMR 6:08 (2B)		Medium		
2.174	Storage of Matches 527 CMR 10:18 (1b)		Medium		
2.175	To Maintain an Existing / New Storage Tank Facility		High		
2.176	Mechanical Rubbish Containers 527 CMR 34:03		Medium		
2.177	Salamanders for Construction 527 CMR 20:01 (10)		Medium		
2.178	Keeping of Smokeless Powder 527 CMR 13:04 (2a)		Medium		
2.179	Service Station Upgrade per 527 CMR 5 & 9		High		
2.180	Flammable Fluid, Solid, Gas Storage 527 CMR 14:03 (1)		High		
2.181	Tar kettle on Roofs 527 CMR 10:03 (12)		Medium		
2.182	Apply / Remove Material w/Flame 527 CMR 10:24 (2)		Medium		
2.183	Fire Lockbox Application		High		
2.184	Community Response Team Certification		Medium		
2.185	Child Safety Seatbelt Program		Medium		
2.186	Grill Permit (charcoal / Gas - yearly)		Medium		
2.187	Cannon Shooter Permit - CMR 527-2200		Low		
2.188	Model Rocket Permit - CMR 527-1600		Low		
2.189	Clambake Permit		Medium		
2.190	Smoke Certification 26F		High		
2.191	Marine Fueling Permit		High		
2.192	**Fire Department - Inspections**	Use Massachusetts Fire Codes or National Fire Codes as is appropriate by Municipality.	Critical		
2.193	Inspection results output based on Fire Code Check lists.		Critical		
2.194	**License Department**		Critical		
2.195	**Liquor**		Critical		
2.196	Annual/Seasonal All-Alcoholic		Critical		
2.197	Annual/Seasonal Wine & Malt		Critical		

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	Forms from Customers, Outputs to Customer or Others					
Req #	**Requirement Statements Related to Departments**	**Goals/Notes**	**Priority**	**Response**	**Effort**	
2.198	Annual Club		High			
2.199	Annual General on Premise		High			
2.200	Non Profit		High			
2.201	Package Store		Critical			
2.202	Annual/Seasonal Inn holder all Alcoholic		Critical			
2.203	Annual/Seasonal Inn holder Wine & Malt		Critical			
2.204	One Day All Alcoholic/Wine & Malt		High			
2.205	Filing Fee	Display fee schedule	High			
2.206	**Entertainment/Misc.**		Critical			
2.207	Annual Weekday Entertainment		Critical			
2.208	Annual Sunday Entertainment		Critical			
2.209	Amusement		Critical			
2.210	Automatic Amusement		Critical			
2.211	Bowling Alley		Medium			
2.212	Christmas Tree Sales		Medium			
2.213	Class I or II		Medium			
2.214	House Moving		Medium			
2.215	Misc. Permit/License		High			
2.216	Mobile Vendor		Medium			
2.217	Pool Tables		High			
2.218	Transient Vendor		Medium			
2.219	Hawker/Peddler		Medium			
2.220	One Day Entertainment		High			
2.221	Filing Fee	Display fee schedule	Medium			
2.222	Fee for License change	Display fee schedule	Critical			
2.223	Yard Sales		High			
2.224	**Clerk Department**		Critical			
2.225	Animal License		Critical			
2.226	Fishing License	Many different rate Levels	Low			
2.227	Hunting License	Many different rate Levels	Low			
2.228	Sporting License		Low			
2.229	Trapping License		Low			
2.230	Archery Stamp		Low			
2.231	Waterfowl Stamp		Low			
2.232	Primitive Firearms Stamp		Low			
2.233	Wildlife Conservation Stamp		Low			
2.234	Shellfish License		Low			
2.235	Eel License		Low			
2.236	Passport		Low			
2.237	Business Certificate or Discontinuation		Critical			
2.238	Certified Death Certificate		Low			
2.239	Certified Birth Certificate		Low			
2.240	Certified Marriage Certificate		Low			
2.241	Marriage Intentions		Low			
2.242	Street List / Zoning Book		Low			
2.243	Photo Copies / Personal Copies		Low			
2.244	Raffle/Bazaar Permit		Medium			
2.245	Seal A Card		Low			
2.246	Pole Locations		Low			
2.247	Gas and Fuel Storage License		High			
2.248	Junk Collector & Dealer License		High			
2.249	Garden Plots		Low			
2.250	Computer Printout / Disk		Low			
2.251	Disposal Sticker	Similar to the Massachusetts car inspection process, include and print sticker on 8 1/2 x 11 paper stock with peal off sticker for Car For online or mail requests print results of requests in a batch for mailing.	Critical			
2.252	Beach Sticker	Same output efficiency capability as Dump.	Critical			

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	Forms from Customers, Outputs to Customer or Others				
Req #	**Requirement Statements Related to Departments**	**Goals/Notes**	**Priority**	**Response**	**Effort**
2.253	Yard Sale Permits	Additional item that feeds the Calendar / Events solution	High		
2.254	Street / Sidewalk Blocking Permit	Additional item that feeds the Calendar / Events solution	Medium		
2.255	Auction	Additional item that feeds the Calendar / Events solution	Low		
2.256	Public Assembly Permit	This is for permitting of events from Weddings to Triathalons to Boston Pops on the Beach. A workflow management application.	High		
2.257	Maps - Zoning, Aquifer		Low		
2.258	Tide Charts		Low		
2.259	Rules and Regulation Subdivision of Land		Low		
2.260	**Natural Resources - Applications**		Low		
2.261	Mooring Wait List		Medium		
2.262	Marina Wait List		Medium		
2.263	Commercial Off Loading		Low		
2.264	Transient Slip Application		Low		
2.265	Commercial Offseason Slip		Medium		
2.266	Seasonal Dinghy Permit		Medium		
2.267	Winter Boat Storage Application		Low		
2.268	**Natural Resources - Customer Outputs**		Low		
2.269	Boat Mooring		Medium		
2.270	Marina Slip		Low		
2.271	Dog License Reminder Mailing		Critical		
2.272	**Police Department**		Low		
2.273	Parking Fines		Low		
2.274	Fire Arm IDs		Low		
2.275	Court Fines		Low		
2.276	Pistol Permits		Low		
2.277	Parking Permits		Low		
2.278	Taxi Permit		High		
2.279	Taxi Waiting List Renewal		High		
2.280	Taxi Waiting List		High		
2.281	Tour Bus / Limo permit	Town permits for operation, with State licensing applying	Medium		
2.282	State Licensing - Bingo/Beano, Tour Buses, Livery, Limos, Doing Business As, etc.		Low		
2.283	**Community Development**		High		
2.284	**Planning - Applications**		High		
2.285	Application for Approval of Definitive Subdivision Plan - Form C		High		
2.286	Application for Special Permit Hearing		High		
2.287	Design Review Application		Medium		
2.288	Application for Endorsement of Plan Approval not Required - Form A		High		
2.289	Application for Approval of a Preliminary Plan - Form b		High		
2.290	Application for Approval of Amendment, Modification or Rescission of a Subdivision Plan		High		
2.291	**Planning - Outputs to Customers**		High		
2.292	Certificate of Approval with Modifications of a Definitive Plan - Form C2		High		
2.293	Certificate of Dis-Approval of a Preliminary Plan - Form B2		Medium		
2.294	Certificate of Dis-Approval of a Definitive Plan - Form C3		Medium		
2.295	Certificate of Performance - Form G		High		
2.296	Complete Release of the Planning Board		Medium		
2.297	Planning Board Covenant - Form F		High		
2.298	**Planning - Fees**		High		
2.299	Planning Board Fee Schedule	In general display fee schedules online for public viewing for all fee types.	Low		

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	Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages				
2.300	**Board of Appeals - Applications**		High		
2.301	Board of Appeals Application (fees shown on Forms)		High		
2.302	**Board of Appeals - Outputs to Customers**		High		
2.303	Various Mail merge types of forms and documents sent to customers - examples uploaded		High		
2.304	**Conservation Commission - Applications**		High		
2.305	WPA Form 1- Request for Determination of Applicability	Preference is interface to eDEP system	Low		
2.306	WPA Form 3 - Notice of Intent	Preference is interface to eDEP system	Low		
2.307	WPA Form 4A-Abbr Notice of Resource Area Delineation	Preference is interface to eDEP system	Low		
2.308	WPA Form 8A-Request for Certificate of Compliance	Preference is interface to eDEP system	Low		
2.309	**Conservation Commission - Outputs to Customers**		High		
2.310	WPA Form 2 - Determination of Applicability		High		
2.311	WPA Form 4B - Order of Resource Area Delineation		High		
2.312	WPA Form 9 - Enforcement Order		High		
2.313	Emergency Certification		High		
2.314	WPA Form 5 Order of Condition		High		
2.315	WPA Form 7-Extension Permit for Orders of Condition		High		
2.316	WPA Form 8B-Certificate of Compliance		High		
2.317	**Conservation Commission Inspection Checklist**		High		
2.318	None??		Medium		
2.319	**Conservation Commission Fees**		High		
2.320	Conservation Commission Fee Schedule		High		
2.321	**Historic District - Applications (fees shown on Application)**		High		
2.322	Historic Application		High		
2.323	Historic Certificate of Exemption		High		
2.324	Historic Demolition Application		High		
2.325	**Engineering Applications**		High		
2.326	Petition for Private Road Work		High		
2.327	Road Opening Permit		High		
2.328	Street Sign Request		High		
2.329	Street light turn on request and fee payment	Certain non essential street lights have been turned off to save energy and maintenance. Residents can buy back the rights to have certain non essential street lights turned back on.	Low		
2.330	**Assessors Reporting**	Provide reports and alerts to Assessors related property valuation changes	High		
2.331	Automatic / Scheduled Reports or alerts to assessors when a construction project reaches a certain stage of completion.	For example when the insulation final inspection is completed many assessors will change the property value since the rest of the project will proceed quickly from this point.	High		
2.332	Automatic / Schedule Reports or alerts when an inspector indicates that what they have observed at a property site does not match the assessor information.	If the inspector see an central air conditioner compressor unit outside or a deck or the number of bedrooms do not match update the inspection record to indicate the change.	High		
2.333	Data extracts from the permitting system to allow for import into the Assessing system when construction projects are completed	Reduce data input relative to manually keying in property change information	Low		
2.334	Automatic / Schedule Reports or alerts when a final inspection is complete which would normally require an Assessor to visit the property. Depending on the Municipality, the inspector may take a picture of the property, verify or provide new measurements and indicate the construction grade.	Reduce the need to hire outside contractors or reduce Assessor staff time by having inspectors take pictures and provide other information to reduce costs associated with Assessor activity once a construction project is completed.	High		

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Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
2.335	**Treasurer Reporting**	Provide tools that will allow the Treasury department to more easily perform bank and credit card reconciliation tasks.	Critical		
2.336	Daily cash and check deposit reporting with totals and splits by type		Critical		
2.337	Daily credit card by credit card type reporting	Certain credit card types clear at different times, must split the deposit amounts by credit card types	Critical		
2.338	Reporting by account / department types to track dollars going to different bank accounts related to dollars received		Critical		
2.339	Generate export files related to the revenues received by account type for import into Financial Management systems	Reduced data input and errors related to manually keying this information.	Low		
2.340	**Accounting Department Reporting**	Provide reports similar to what is available to the Treasurers to provide an audit check of Department and Treasurer Activities -- assist in balancing to the General Ledger in the Financial Management System	High		
2.341	**Water / Sewer Applications**		Medium		
2.342	Commercial Industrial Transfer		Medium		
2.343	Commercial Industrial Water Service		Medium		
2.344	Demolition Sign Off		Medium		
2.345	Meter Permit Application		Medium		
2.346	Residential Water Service Application		Medium		
2.347	Variance to Water Service Size Requirement		Medium		
2.348	Water Service Transfer Form		Medium		
2.349	Water Signoff Form / Automated Indication	Water sign off form for Building Department Permits	High		
2.350	Sewer Privelege Fee - Connection Fee		Medium		
2.351	Deduct Meter (water) application	To handle separate water meter for water consumed but not discharged to sewer system	Medium		
2.352	Non-Metered Sewer	Application and fee for non-metered sewer install - no water meter	Medium		

Req #	Vendor Comment / Note About Response Above

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
Req #	**Requirement Statement**	**Goals/Notes**	**Priority**	**Response**	**Effort**
3.001	Demonstrated ability to configure and implement a regional solution as described in other areas of the RFP.		Critical		
3.002	An ability to analyze and configure multiple areas with multiple staff members simultaneous to meet an aggressive schedule areas are as follows: - Building Permits and Inspections - Health Permits and Inspections - Fire Permits and Licenses - Beach and Disposal Stickers - Business and Dog Licenses - System Interfaces	An aggressive schedule will require the configure multiple system areas at the same time.	Critical		
3.003	An ability to pull in configurations from Massachusetts and Non Massachusetts clients and Vendor Developed best practice configurations to meet an aggressive schedule.	An aggressive schedule will not having to start from scratch	Critical		
3.004	An ability to manage large complex projects with Microsoft Project or equivalent tools		Critical		
3.005	The ability to work with 3 pilot sites for the implementation of: - Building Permits and Inspections - Health Permits and Inspections - Fire Permits and Licenses - Beach and Disposal Stickers - Business and Dog Licenses - System Interfaces		Critical		
3.006	The ability to work with up to 15 pilot sites to implement the same process except for rates for: - Beach and Disposal Stickers - Dog Licenses - Other functions with the same process	Additional sites for these simple functions will be added only if they have the same configuration as one of the pilots except for a different rate structure.	High		
3.007	The ability to deliver certain functions to completion throughout the project to provide quick wins prior to the project end date. These functions would rely heavily on Vendor best practice models that can be refined as needed.	Demonstrate progress and benefits. Also get feedback from end customers quickly before the entire solution is delivered.	Critical		
3.008	Ability to use remote capabilities to allow for system design collaboration, configuration, testing and implementation. The region has a WebEx Licenses and a SharePoint Server for for this project.	Reduce travel costs for the initial deliverable and the cost to implement sites after the pilot implementation.	Critical		
3.009	Remote meeting, desktop control capabilities to work with clients throughout the region from a base of operations in the region or from the Vendors home location as part of a mix of onsite and remote project work	Reduce travel costs for the initial deliverable and the cost to implement sites after the pilot implementation.	Critical		
3.010	An ability to document and retain project plans, configuration, testing scripts, etc. To allow for rapid implementation of sites after the pilots		Critical		
3.011	An ability to provide a train the trainer approach for functions allowing for the region as is appropriate to make configuration , interface and other system modification to supplement vendor staff to deploy rapidly and reduce ongoing maintenance costs		Critical		
Req #	**Bidder Comment / Note About Response Above**				

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
Req #	**Requirement Statement**	**Goals/Notes**	**Priority**	**Response**	**Effort**

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			

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Req #	**Requirement Statement**	**Goals/Notes**	**Priority**	**Response**	**Effort**
4.001	Vendor or third party has the ability to host their solution in the cloud using a web browser only	Eliminate the need for each municipality to purchase and maintain their own servers, backup and disaster recovery capabilities. Allow for the use of field devices with direct connects to the hosted solution or a copy of the hosted solution that will synch as data changes. Reduce the need to municipalities to do their own software updates / upgrades, interfaces with others system and capabilities.	Critical		
4.002	Vendor or third party has the ability to host the Vendor solution in the cloud using a thin client - a browser only / cloud only solution is not available		High		
4.003	VPN Tunneling capability to allow for integration with remote system application real-time	Allow for two way integration with remote Municipal systems	High		
4.004	FTP capability to allow for acceptance of files from Municipalities and the State for data required to be imported into the application	If cannot directly connect with remote system via VPN connect via FTP?	High		
4.005	An ability to Host Business Objects/Crystal Reports or provide remote access to the database for a tool like Business Objects/Crystal reports to run custom reports by the end customer or an ability to transmit the database files to the Municipal clients hosting facility to allow for generating custom reports from a day old or week old copy of the databases. Or provide the capability of automatically transmit copies of the database for reporting purposes.	Municipal operations often link data from multiple systems to allow for developing decision support tool using multiple data sources.	High		
4.006	Has or will have a main site and backup site capability.		High		
4.007	Backup / Disaster Recovery site is not located on Cape Cod	Allow for continuing system operation if a major event affects the Cape Cod Area	High		
4.008	Has mirrored drives for onsite disk drive that allow for continuing operations in the even of a disk failure.		High		
4.009	Has hardware with hot swappable capabilities.		High		
4.010	Has an uptime record of 95% or better 24 x 7		High		
4.011	Routinely schedule system maintenance on hours after 12 Midnight and before 5:00 AM or can perform maintenance without disruption to customer operations.		High		
4.012	Maintains a 24x7x365 operation environment		High		
4.013	Maintains a high-speed access to the internet		High		
4.014	Has or will have a written disaster recovery plan available for review the customer.		High		
4.015	Alerts customers to any planned outages of more than .5 hours so that appropriate message may be posted on the client website prior to entering the application		High		
4.016	Average server age is 4 years or less.		High		
4.017	Has had no security breaches or explains security breaches at the bottom of the document including steps taken to eliminate the potential for other similar security breaches		High		
4.018	Has or will have redundant access to the internet.		High		
4.019	Has or will have the ability to host other solutions commonly used by a municipality such as VOIP, all manner of messaging, financial management and other applications.		High		
4.020	Financial stability can be demonstrated		High		

Req #	Requirement Statement	Goals/Notes	Priority	Response	Effort
Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
4.021	**Facility and Physical Requirements**		High		
4.022	Multiple physically separate connections to public power grid substations		High		
4.023	Continuous power supply with backup uninterruptible power supply (UPS) systems:		High		
4.024	Adequate UPS capacity including air conditioning and lights		High		
4.025	UPS systems tested at full load on monthly schedule		High		
4.026	Fuel for UPS generators (48 hours worth) kept on premises and monitored for local environmental compliance		High		
4.027	Conform to or exceed applicable local structural building codes utilizing standards such as bullet proof glass, fire doors and reinforced walls and complying with disaster proof design:		High		
4.028	Comply with all local zoning ordinances		High		
4.029	Certify not located in a 100-year flood plain		High		
4.030	Earthquake and hurricane bracing on all racks and cable trays (where appropriate)		High		
4.031	Adequate multizone air conditioning, including a backup system for the multizone air conditioning:		High		
4.032	Climate control including humidity sensors and control		High		
4.033	Heat and smoke detectors that meet or exceed all local fire code regulations.		High		
4.034	Very Early Smoke Detection Alarm (VESDA)		High		
4.035	FM200 [ETG5] fire suppression system in data center and NOC		High		
4.036	Separate detection/FM200 zone under raised floors		High		
4.037	Preaction dry pipe system zoned to release water only where needed		High		
4.038	Easily removable access panels in raised flooring		High		
4.039	Flood sensors and monitoring under raised floors and in other critical areas		High		
4.040	Separate grounding systems to prevent grounding loops; true ground versus green wire ground		High		
4.041	Sealed cable vault entrances to facility, remotely monitored		High		
4.042	Formalized physical facility preventive maintenance program		High		
4.043	Sub-breakers per relay rack or lineup		High		
4.044	48 VDC power converters, 220 VAC, 20A, 30A, 40A		High		
4.045	Power filtering in UPS system		High		
4.046			High		
4.047	**Physical Security**		High		
4.048	Written security policies readily accessible:		High		
4.049	Badge sharing and piggy back entry rules		High		
4.050	All visitors must be admitted through reception		High		
4.051	Written statement of work upon sign-in		High		
4.052	Building access procedures:		High		
4.053	Limited number of building entrances in compliance with local fire ordinance		High		
4.054	Provide access to limited and managed security policies for all facility entrances		High		
4.055	24x7 onsite security guards		High		

Req #	Requirement Statement	Goals/Notes	Priority	Response	Effort
	Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages				
4.056	Visitor-logging procedure		High		
4.057	Card-key, biometric, or similar entry locks		High		
4.058	ID-badge system for all employees and visitors		High		
4.059	Staff and visitors must wear badges at all times on premises		High		
4.060	Individual cabinet locks; master in NOC; key list from customer		High		
4.061	Equipment locations:		High		
4.062	Video surveillance and motion sensors for entrances, interior doors, equipment cages, and critical equipment locations within the building		High		
4.063	Locked cages with ceilings; locking cabinets with climate control for those wanting more privacy		High		
4.064	Secure rooms available		High		
4.065	Managed firewall services with 24x7 monitoring available		High		
4.066	Backup lighting systems for entry ways and cable vaults		High		
4.067	Individual cabinet locks; master in NOC; key list from customer		High		
4.068	**Network Security**		High		
4.069	Written network access security policies readily accessible:		High		
4.070	Password policies (such as not sharing, lengths, forced renewal, aging)		High		
4.071	Acceptable use (ISP not allowed to run programs that are illicit or illegal; use of sniffers or cracking/hacking programs are not required)		High		
4.072	Documented user responsibilities on security in company policies and re-enforced by education		High		
4.073	Asset protection		High		
4.074	Network security infrastructure in place:		High		
4.075	Perimeter protection (firewalls, filtering router)		High		
4.076	Intrusion detection		High		
4.077	Authentication and authorization (passwords, RADIUS/TACACS, Secure IDs)		High		
4.078	Backup and recovery systems to restore after a problem, such as load balancing, failover protection		High		
4.079	Regular assessment of network infrastructure		High		
4.080	Assessment of network expansions or additions		High		
4.081	Tape or media storage offsite backup		High		
4.082	Regularly scheduled security audits		High		
4.083	Server antivirus software protection		High		
4.084	**Operations**		High		
4.085	Database of all installed equipment and configurations		High		
4.086	Toll-free telephone support		High		
4.087	Supported monitoring:		High		
4.088	24x7 monitoring of dedicated servers and network equipment (note both frequency and method, such as PING, Simple Network		High		
4.089	Management Protocol [SNMP])		High		
4.090	24x7 monitoring of the health of the equipment with alarms and pager alerts for network failure and failovers		High		
4.091	24x7 monitoring firewall services available		High		
4.092	Alternate NOC available		High		
4.093	Second-tier support personnel located nearby		High		
4.094	Trouble ticket processes:		High		

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Req #	**Requirement Statement**	**Goals/Notes**	**Priority**	**Response**	**Effort**
4.095	Created and logged for all unusual or unexpected events		High		
4.096	Automated case escalation procedures in place including escalation timeframes		High		
4.097	Reporting that provides trending statistics on trouble tickets and minutes (above) to facilitate quality and customer reports		High		
4.098	Performance reporting and end-user impact monitoring		High		
4.099	Periodic and exception reports provided to customers (including usage and problem reports)		High		
4.100	Spare equipment on site for key networking equipment available in case of hardware failure		High		
4.101	Business continuity plan:		High		
4.102	Daily site backups		High		
4.103	Tape vaults or other secure storage facilities on site in case of natural disaster		High		
4.104	Onsite and offsite storage available		High		
4.105	Customer callout and escalation database		High		
4.106	Intercom system		High		
4.107	Written procedures for each customer on alarm handling		High		
4.108	**Backbone Connectivity**		High		
4.109	Multiple direct connections to Tier 1 Internet carriers using high speed Cisco routers as gateways		High		
4.110	Border Gateway Protocol vs. 4 BGP-4 routing		High		
4.111	Class C Internet address blocks available		High		
4.112	All backbone services have Cisco Powered Network Program member designation		High		
4.113	Each carrier has a secure termination area, and location supported via the NOC or the carrier providing the termination		High		
4.114	Fiber enters the data center through diverse conduits or routes (for example, if a backhoe cuts though conduit, the network reroutes to minimize loss of service)		High		
4.115	No Requirement		Low		
4.116	Aggregate bandwidth sufficient to scale the network to meet customer's service demands		High		
4.117	Describe policy on facility utilization or over-subscription		High		
4.118	Provider must have private facilities connecting to other data centers, and a documented process		High		
4.119	Multiple Internet access		High		
4.120	Carrier XCONN and distribution system; separate carrier point-of-presence (POP) area		High		
4.121	Formalized SLA policies		High		
4.122	Roof rights and riser conduit right of way		High		
4.123	Multiple riser conduit from cable vault to data center		High		
4.124	**Gateway/WAN Edge Layer**		High		
4.125	High-end routers in a redundant configuration		High		
4.126	Hot Standby Router Protocol (HSRP) implemented		High		
4.127	BGP-4 implemented		High		
4.128	Adequate total packet-per-second capacity for peak customer load		High		
4.129	Firewalls in place		High		
4.130	Network security team in place		High		
4.131	Remote firewall management offered		High		
4.132	**Core Layer**		High		

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Req #	**Requirement Statement**	**Goals/Notes**	**Priority**	**Response**	**Effort**
4.133	High-end switches deployed		High		
4.134	Switching and links entirely redundant with no single points or paths of failure		High		
4.135	Web cache redirection implemented		High		
4.136	Content and Transmission Control Protocol (TCP) offloading implemented via reverse proxy caching		High		
4.137	HSRP implemented for fail-over protection		High		
4.138	Intrusion detection implemented (such as Cisco Intrusion Detection System)		High		
4.139	Automatic notification of intrusion attempts in place		High		
4.140	**Distribution Layer**		High		
4.141	High to mid-range switches deployed		High		
4.142	Switching and links entirely redundant with no single points or paths of failure		High		
4.143	Caching systems implemented		High		
4.144	Server load balance implemented		High		
4.145	Server content routing implemented if multiple data centers		High		
4.146	Caching implemented		High		
4.147	**Access Layer**		High		
4.148	Mid range switches deployed		High		
4.149	All servers dual homed		High		
4.150	**Cabling**		High		
4.151	All cable runs located under raised flooring and appropriately marked		High		
4.152	All cable runs physically protected from damage via tie-downs or where appropriate in conduit		High		
4.153	All cabling designed to Category 6 specifications (to support 1-Gbps data rates)		High		
4.154	Communications cabling raceways separate from electrical; no intersections		High		
4.155	Shielded cabling for T1/T3s. DSX panels for XCONN, demarcation, and test points		High		
4.156	All cabling on raceways, tied down		High		
Req #	**Vendor Comment / Note About Response Above**				

Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages

Req #	Requirement Statement	Priority	Response	Effort
5.001	The system must provide a secure login capability with multi-level authentication, which provides customers with authorized access to their own secure customer data.	Critical		
5.002	The same login can be used to process Permits, Licenses and Inspection for any Municipality in the regional or statewide system.	Critical		
5.003	The system must require the customer to provide an email address.	High		
5.004	The system must perform basic e-mail input editing and perhaps use an e-mail authentication process to ensure a valid e-mail is provided.	Medium		
5.005	The system must allow the customer to indicate if Municipalities can use email as the primary method of communicating with them concerning license renewals, permits, inspections, etc. Ask also about phone, fax, etc.	High		
5.006	The system must provide the ability for external users such as customers and applicants to re-set their password in an automated fashion that does not require staff attention.	High		
5.007	The system must allow authorized staff members with appropriate security access to update user email addresses and reset external user passwords to temporary passwords, then send an email to the user instructing them on how to login and re-set their own password.	High		
5.008	The system must be configurable to select what data fields will be visible to and editable by customers on their web interface.	Critical		
5.009	Permits and Licenses can be granted to individuals or to businesses	Critical		
5.010	Individuals or Parcels can hold more than one permit or license which may be issued by the same Agency or multiple different Agencies. All permits or licenses held by that individual or parcel must be related to the same individual, business and/or parcel record.	Critical		
5.011	The system must have a unique identifier for each customer which is generated by the application, can be exported to various other systems or vendors, and can be used as matching criteria to import data from the vendors or system thereby relating data to the appropriate customer. The unique identifier must be assigned arbitrarily and must not incorporate SSN, FEIN, or birthday information. The identifier may be sequential.	High		
5.012	The system must provide a method whereby multiple customer records which are determined to be for the same person or business can be consolidated, and permits, licenses, inspection, service orders and work orders related to the various customer records are moved to be all related to one customer record.	High		
5.013	When entering a new application, the system must attempt to prevent storing duplicate customer records by presenting a list of matching person records for selection.	Medium		
5.014	Contact and identifying information must be stored for each applicant / customer.	Critical		
5.015	The system must be able to store multiple addresses for each customer. Each address must be able to be classified by type such as home, business, temporary.	High		
5.016	Each address record must include effective and expired date fields.	High		
5.017	One address must be able to be designated as the primary address. The primary address will be used for mailing. The primary address prints on proofs of licenses, permits or inspections such as licenses or wall certificate.	High		
5.018	Contact address information data fields in the application must accommodate Canadian and other foreign addresses.	High		
5.019	The country portion of the address should default to United States and can be specified based on an alphabetized drop down list.	Medium		
5.020	The system must retain all information related to the applicant and application after their license or permit is issued.	High		
5.021	The system should provide the ability to create mailing labels from the data.	Medium		
5.022	The system must have the ability to place mailing address in a location on the form to allow for appearing through a window envelop.	High		
5.023	The system must have the ability to validate addresses upon entry or import. This could be accomplished with built in functionality in the application or integration with a 3rd party software.	Medium		
5.024	When an address is entered or imported the system must do a check to insure that the zip code and town/city match per U.S. Post Office standards.	Medium		

Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages

Req #	Requirement Statement	Priority	Response	Effort
5.025	When an address is imported and fails validation, the system must reject the record and log the error. Notification of the error must be sent to the vendor who supplied the file and the appropriate staff who will work on the problem with the vendor.	Medium		
5.026	When the address is manually entered and address validation fails, an error message should appear and an opportunity to select a suggested correct address that would pass validation should be offered.	Medium		
5.027	The system must maintain a history of addresses.	High		
5.028	The system must provide a method which allows an address to be marked as 'bad' by staff members. This indicator should prevent the address from being used for any future mailings and should be prominently featured when viewing the address.	High		
5.029	Marking an address as 'bad' or 'expired' must prompt the staff member with an option to send an email to the customer (if an email address is available). The email is to inform the customer that they need to update their address with Municipalities and instructs them to do so online. The staff member should be able to choose not to have the email sent.	High		
5.030	The system must be able to produce a report which lists any active Permits, Licenses or inspections which have a bad/expired address as their current or latest address available.	High		
5.031	The system must allow staff members to easily change a current or prior address to be the primary address	High		
5.032	The system must be able to flag whether each Permit or License type does or does not allow the address associated with the license to be updated by a customer online.	High		
5.033	The online account update and renewal process provided by the system should provide an alternative to updating addresses so that customers CONFIRM that the address is correct if the Permit, License or Inspection type does not allow address updates. Lack of confirmation should trigger a workflow notice to Staff to follow up with the customer with follow-up instructions.	Medium		
5.034	The system security should be configurable in order to specifically allow or disallow groups of staff users to edit addresses on Permit, License or Inspection types where customers are not allowed to edit the address.	Medium		
5.035	The system must provide a way to flag a customer's record as protected / private such that their contact information will not be displayed on the public web site.	High		
5.036	Private contact information should be displayed to staff with an obvious visual indicator such as appearing in red text or with an alert message right next to the address.	Medium		
5.037	The system must provide data storage for additional alternate names.	High		
5.038	Names must be classifiable by type such as maiden names, name change, aka, etc.	Medium		
5.039	Alternate names must have between date indicators so that the time period that the name was current and used can be clearly indicated.	Medium		
5.040	The system should have the ability to define an online process which guides customers through updating or providing the following information the first time they log in online. 1. Confirm / update their contact information (address & phone number) on individual licenses and permits. 2. Confirm / provide their Workers Comp Insurance information if applicable 3. Confirm contractor registration information if applicable 4. Confirm / provide their email address 5. Authorize Municipalities to communicate with them via email rather than on paper for renewal reminders, etc. 6. Verify that all of their licenses and permits are related to and available via this login - customer would be asked to input any missing license numbers so that staff can follow up and correct the relationship between the customer and the license records.	High		

Req #	Vendor Comment / Note About Response Above

05 Customer

Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages

Req #	Requirement Statement	Priority	Response	Effort

Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
6.001	The system must enable a customer to apply for a new permit, license or inspection over the internet.	Critical		
6.002	A step of the online application process must be to select the location of permit, license or inspection type that they wish to apply for. This might include data input of the information or location via Geographical Information System (GIS) display.	High		
6.003	The applicant must either log into an existing account or create a new account when applying for a permit, license or inspection online. The account may be a single regional or statewide account.	High		
6.004	The online permit, license or inspection application process must include a screen of affirmation text for the customer to click on and indicate that they agree to the statements as part of the permit, license and inspection application process. The affirmations will include but is not limited to statements such as all the information provided is truthful and provided under pains and penalty of perjury .	High		
6.005	The online application process must require the applicant to provide contact information including an email address.	High		
6.006	The online application process should break the application process into logical information collection and process steps and guide the applicant through the process indicating where they are in the process.	Medium		
6.007	The system's online application process should be configurable such that permit, license and/or inspection fee payment step may not be required (or allowed) until after the application is reviewed and approved. The system should allow configuration to acceptance of payments and the production of a permit, license and the arrangement for an inspection depending on the business rules for that particular type and if other business rules are met related to the specifics of the applicant or license information -- for example no permit can be printed by the end customer if outstanding payments apply to the parcel.	High		
6.008	The application process must allow the applicant to print a one page letter size cover sheet containing key information from their application. This cover sheet could be used in order to mail, e-mail or fax in hard copy documentation and / or mail in a check if the applicant did not pay online. The cover sheet could also be used for the applicant's records and reference.	Medium		
6.009	The online application process must inform the applicant that their application will be considered abandoned after a designated period of time (tbd) if it is left incomplete or is not fully paid for. • New applications which are not complete online should be marked in Pending status. • New applications which are complete but not paid for online should be marked in New status; these await staff attention. • Subsequent receipt of an over the counter or mailed payment for the application would move the application into New status and trigger appropriate tasks in the Municipalities work queues. • The system must automatically update the status of Pending and Pending Payment applications to Abandoned after the designated elapsed time. Prior to the application being abandoned configuration should allow for e-mailing the pending abandonment.	High		
6.010	The online application process must include standard or be able to create custom fields to collect data from applicants so that all application data can be collected to promote a paperless process	High		
6.011	The online application process should allow the applicant to save the application in process and be able to return to complete it, to print a new cover sheet, or to upload / submit additional documentation related to the application at a future time or date.	High		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
6.012	The system must be integrated with the individual Municipality's online payment vendor to accept online payments for applications. In addition, if the region negotiates with a single online payment vendor the system should facilitate the payment of the funds to the appropriate Municipality.	Critical		
6.013	Each municipality should be allowed to have a different online payment vendor. That is compatible with the vendor's system.	High		
6.014	Depending on the Permit, License or Inspection type the funds related to these transactions may be made to a different Municipality Bank Account.	Medium		
6.015	The system must include the ability to upload and store document attachments (.pdf, .doc, .gif, etc.) as a part of the permit, licensing and inspection process both by a customer online and by Municipal staff to facilitate a paperless process and the quick retrieval of all appropriate documents.	Critical		
6.016	The system must be configurable to specify a list of documents which would accompany the application for each permit, license and inspection type such that the document type being uploaded (e.g. floor plan, occupancy permit, rabies certificate, motor vehicle excise tax, property tax or utility payments, etc.) can be identified by selecting it from a drop down list.	Critical		
6.017	The system should provide a method to print a fax cover sheet for each document in case the applicant is unable to upload the documents on the web. The fax cover sheet would clearly identify the permit, license and inspection application that the document goes with, which required document it is, provide instructions on how to use the cover sheet, and indicate the telephone number to fax the document to.	Medium		
6.018	The fax cover sheet format should be configurable to include scan lines, bar codes, or other similar electronically readable information that can be used to identify the permit, license and inspection application the document goes with and document type.	Medium		
6.019	The system should be able to import and store faxed document images and based on information on the cover sheet, relate the document image to the appropriate permit, license and inspection application and document type in the system.	Medium		
6.020	The online applicant must have access to a checklist of items which are needed to complete the application process.	Medium		
6.021	A new application entered online should trigger a notice or a line in the a workflow queue within the system directed to the appropriate staff that there is a new application ready to be reviewed. If the permit or license was completed online then notice or indication in a work queue that a permit or license was completed online should appear.	Medium		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
6.022	The system must store a status code for each application. Status flags/codes are used to indicate progress through business processes, reporting, & summary purposes and to indicate progress to applicants on the web. Application status may include: 1. Pending - application not yet completed by applicant online. 2. Pending Payment - application complete online but not yet paid for. 3. New - just been entered online by user, waiting staff review. 4. Review - application is in the review process, staff is looking at the application. 5. Approved - Completed -- system rules have allowed the processed to be approved and completed online by the customer without staff intervention. 6. Approved - application has been approved for a license to be issued. 7. Denied - application was not approved. 8. Abandoned - application process was not completed within designated time frame. 9. Expired - application requirements not met within designated timeframe. Re-application required.	High		
6.023	The system must be able to render the application no longer editable online once the application moves into REVIEW status.	High		
6.024	The system must be able to track the reason an application was denied. The reason must be selected from a limited list provided by the system. This information must be required data entry if the application's status is Denied and the field should be unavailable for entry if the status is anything else.	High		
6.025	The system must allow the permit, licensing and inspection requirements to be configured for each type and then track that each condition has been met. Applicants may need to meet multiple pre-requisite conditions including but not limited to ABC, Workers Comp Insurance, Contractor Registration, no outstanding tax or other payments, residency and other checks. The intention is to have the system attempt to automate these checks, however, in some cases documents may be required to complete the checks.	High		
6.026	The system must be configurable to require and track inspections as a pre-requisite requirement for the issuance of a license or occupancy permit.	High		
6.027	The system must allow each permit, license and inspection type to be configured with its own unique workflow process for the review and approval of applications.	High		
6.028	The system process must provide or integrate with one or more automated and efficient methods for receiving and importing files from other systems or interfacing with other systems that contain Contractor Registration, Business Workers Compensation Insurance, Alcohol Beverage Control Commission, Delinquent Tax, Assessor Data, Geographic Information, Document Management and other systems and data sources. Acceptable transmission or interface methods include: • A web page where vendors can log in and upload files. • An secure email address attended by the system that the vendors can send files attachments to. • A secure FTP site attended by the system. • Communications software Interchange. • ODBC • Web Services	High		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
6.029	Import processes in the system must be configurable to support various business processes for issuing licenses or permits. Processes will be consistent and predictable by license and permit type and vendor file. Scenarios that the system must be able to accommodate include receiving vendor files which contain: • Rabies information from Veterinarians • Rental certificate information indicating tenants, tenant contact information, number of occupants, etc. to facilitate a rental certification / inspection program. • Contactor Registration information from the State • Workers Comp Insurance information from the State • ABCC Alcoholic Beverage Control Commission information from the state • Vehicle registration information to update frequency beyond getting information form the state for billing • Environment Protection Information from eDEP	High		
6.030	The system must perform file validation and data verification for a variety of basic data requirements on every file imported from exam vendors. Validations & verifications must include... 1. All required fields of data are present. 2. Data with specific formats such as zip codes, SSN, and phone numbers are validated for structure 3. Coded values provided appear on the list of valid values (e.g. valid state abbreviations.) 4. Do not import duplicate records o Correct low severity errors and import o Report high severity errors that require human intervention and reject the record 6. Key dates are within logical and appropriate ranges Report any invalid records to Municipalities staff for resolution. Data with errors should not be imported and will be required to be resent from the vendor or manual data input.	Medium		
6.031	The system must allow municipalities to decide which applicant and application information can be viewed by the public on the web.	High		
6.032	The system should provide data entry screens for application information which are set up to follow the existing hard copy forms so that data entry proceeds logically and efficiently.	Medium		
6.033	If multiple forms are needed for an application and the same information is needed across these forms require the input of the data only once.	High		
6.034	The system should notify the applicant if there are outstanding payments due for the Parcel or Business as is applicable for the Permit, License or Inspection type. Likewise if insurance or contractor registration has expired or other condition that may prevent the completion of an application. If these situations occur make available the ability to attach images demonstrating proof of payments, registration or insurance and put permit through a review process rather than allow automatic printing of a permit or license.	High		
6.035	System workflow tracking must be accessible to back office users so that staff can readily determine what remains to be done in order for a permit or license to be issued.	High		
6.036	The system must enable the configuration of application expiration periods based on a specified amount of time passing since the initial application was received. After the expiration date the application must be resubmitted from scratch.	High		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
6.037	The system must allow Staff to search for license and application records by a variety of criteria including: 1. Permit type 2. License type 3. Inspection type 3. Customer Name 4. License, Permit or Inspection number 5. Parcel ID 6. Address - search all addresses available and indicate address type in search results 7. Between dates application submitted 8. Between dates license or inspection issued 9. Status of the license, permit, inspection or application	Critical		
6.038	The search should have the option to limit the search to ACTIVE status permits and licenses only	Medium		
6.039	The system should provide 'smart' searching by name to assist users with finding a record based on a variety of name constructions including: • Hyphenated last names • Last names with multiple parts and spaces between them (O Sullivan) • Names with apostrophes (O'Sullivan) • Names without hyphens or apostrophes that might be expected to have them (OSullivan)	Medium		
6.040	Searching the name field should also automatically search alternate names and include them in the search results.	Medium		
6.041	The system should provide soundex searching to help find names that may be misspelled or spelled differently in the data.	Low		
6.042	The system must allow the use of (or automatically assume) wild card characters for searching within name and address fields.	High		
6.043	The system should provide geographic search methods for staff to retrieve lists of licenses, permits or inspections.	Medium		
6.044	The system should be able to produce a report listing all the license applications which are ready for review at a Board/Department meeting.	Medium		
6.045	The system should display a warning message when a license or permit application is entered which, if granted, would exceed a defined limit that applies to the particular license applicant (for example, if the owner already owns three or more retail alcohol related licenses anywhere in the municipality or would own both an On-Premise and Off-Premise retail alcohol license in the same municipality).	Medium		
6.046	The system should display a warning message when a license or permit application is entered which, if granted, would exceed a defined limit of license types for that particular municipality (for example, if the Municipality already has a limit of 20 liquor stores in the municipality).	Medium		
6.047	The system should allow every shareholder (part owner) on a license to be tracked with the license. Checks on owner limits should be performed for each shareholder on the license application.	Medium		
6.048	The system should allow workflows for a variety of transaction types to be defined in addition to new applications and renewals for some license types (for example, for retail alcohol related licenses). Such transactions are: application for change of address, application for change of location, application for transfer of license, application for change of name on license.	Medium		
6.049	The system should be able to produce a report of transactions per date range and to produce a count of transaction types per date range.	Medium		
6.050	The system should be able to produce a report of transaction revenue by date range.	Medium		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
6.051	The system should be able to perform a check on applications for many license and permit types (for example, for an alcohol related retail license) to see if a license or permit had existed at the same physical address in the last twelve months (called dual conditions). If so, the system should flag the license and issue a warning message to a staff member so that further follow-up on the tax status of the prior customer can be done.	Low		
6.052	The system should allow a license number for some license types (such as for a retail alcohol related license type) to be transferred to new owners and keep a history of the prior owners and the dates between which they owned the license.	Low		
6.053	The system should allow a field to be defined which indicates if a customer has gone into bankruptcy or foreclosure upon license transfers.	Low		
6.054	If a license transfer process is undertaken, the system should warn staff members that the prior owner of the license is indicated as being in bankruptcy or foreclosure.	Low		
6.055	If a community wishes to perform inspection not on all the work done by a contractor but on a selected number of completed projects have the system randomly choose 1 of X number of completed projects to be physically inspected.	Low		
6.056	The system should allow workflow checklist items to be defined such that they can be marked with the recommendation of a staff member to the Board/Department or Commission, for the final decision on granting the license. For instance the investigator might indicate his recommendation for approval, disapproval, or to hold an informational hearing.	Medium		
Req #	**Bidder Comment / Note About Response Above**			

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
7.001	A license, permit or periodic inspection's first expiration date must be configurable to be calculated or set in a variety of ways. • Calculate the date based the issuance of the license, permit or periodic inspections • Set to the next occurrence of a specific date. • Pro-rate the next expiration date based on the issue date of the license.	Critical		
7.002	The system must allow for automatic e-mails or batch creation of letters to let license, permit or periodic inspection customers that their renewal is X number of days from expiration. Where appropriate the customer should be directed to the internet for the renewal.	High		
7.003	The system must allow for permits or license types which never expire and do not need to be renewed.	High		
7.004	The system must generate licenses or permits to be printed in batches which have successfully completed the application or renewal process.	High		
7.005	Each license in the system must have a status indicator. Status codes are used for reporting & summary purposes and to help manage the renewal process. License status may include: 1. Current - license or permit is active, applicant is able to continue operations 2. Upgraded - license or permit is inactive; license or permit was upgraded to a new level 3. Lapsed - license or permit is inactive; it was not renewed by the expiration date but is still within the first renewal cycle 4. Expired - license or permit is inactive; it was not renewed and has aged beyond the first renewal cycle. 5. Revoked - license or permit is inactive; it can not be renewed and was revoked for a variety of reasons. 6. Suspended - license is inactive and can not be renewed; this is a disciplinary status 7. Stayed - license is active and operation is able to continue, however, license or permit can not be renewed until issues with the Municipality resolved. 8. New Number Issued - license or permit is inactive; license or permit was reissued to same entity with a new number due to various causes. 9. Deceased - license is inactive; licensee is deceased.	Critical		
7.006	Status codes must be displayed to the user in plain text.	High		
7.007	Status codes available to select or set must be defined on a limited list of values.	High		
7.008	Each status code should be classified as Active or Inactive such that all active or inactive licenses or permits can be easily selected for purposes such as reporting and archiving without having to analyze and select multiple license or permit statuses.	Medium		
7.009	Licenses or permits should have additional status related flags to help manage processes and which enable reporting on license or permit progress through critical processes such as printing licenses or permits and auditing various aspects related to the license or permit.	Medium		
7.010	The system must be able to produce reports listing license or permit information for all licenses or permits in a selected status by Board/Department and license or permit type. Data for the report must also be able to be limited for selection by Board/Department, permit or license type.	Critical		
7.011	The system must be able to produce a report which counts the number of licenses per Board/Department and license type in a each license status as of any selected date. The default date would be today. Data should be selectable by Board/Department or all Board/Departments and be sorted by Board/Department, license type, and then status.	High		
7.012	The system should be configurable so that if one license associated with a licensee is updated to Deceased status, all other active licenses associated with the licensee are also updated to Deceased. The user should be prompted to confirm this update.	Low		
7.013	License numbers must be issued in sequential series and be unique per license type.	Medium		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
7.014	Each Board/Department has its own license or permit number series that must be tracked and which may vary in the number of digits based on the Board/Department.	Medium		
7.015	When an application is approved and a new license is issued by the Board/Department, the system must automatically issue the next sequential license number for that Board/Department and license type.	Medium		
7.016	The system must provide a method to void license numbers which have been issued in error or have never been issued.	High		
7.017	The system must have the ability to print certifications, licenses, permits, etc. based upon flags or status codes in the database record. They must be able to be printed individually or in pre-scheduled batches.	High		
7.018	The system must facilitate the accurate selection and printing of licenses in batch mode. The licenses or permits to be printed based on new applications and for renewals are produced together in the same batches.	High		
7.019	License output can be configured to produce a document that has both receipt information and print Sticker information located in a specific areas of a page. Beach and Disposal Sticker printing automation.	High		
7.020	License output can be configured to print to a different printer or different printer tray based on the type of Sticker being printed. Beach stickers loaded into one printer or tray and Disposal stickers loaded into a different printer or tray.	High		
7.021	Licenses or permits to be printed are determined by a combination of factors including the status of the license, that all required payments have been received, and that either all application or renewal criteria have been met.	High		
7.022	The appropriate address for the license or permit must be printed on the face of the license or permit. The address will show through an envelope window for mailing purposes.	High		
7.023	Each printed license or permit receives a unique sequential serial number on the face of the license in addition to the license number. The serial number is unique to the printed license so a duplicate printing of the same license would have a new serial number. The application must track the next serial number to be printed on the next license.	Medium		
7.024	The system must save the serial number printed on each license in the database as part of the license record.	Medium		
7.025	The fact that a license or permit has been printed must be recorded in the application database as an event related to the license. The printing process must also update any appropriate process management status flag defined in the application.	Medium		
7.026	A report must be produced at the end of the license or permit printing process which shows the licenses or permits that have been printed both in detail (list of licenses printed) and in summary (counts of licenses printed by Board/Department & type).	Medium		
7.027	The system must be able to store the following information related to licenses or permits and to keep a running history of this information each time a renewed license is issued: • Original License or permit Issue Date - this is set the date the license is first issued and will never change. • License or permit renewal date – actual date the license was renewed by the licensee • License or permit issue date – date the license was approved to be generated • License or permit expiration date • Serial number of the license or permit issued on this date	Critical		
7.028	The system must allow for multiple different permit and license output formats, such Beach and Disposal Stickers, License or permit to be displayed in a place of business or to be displayed at a construction site. The system must allow for changing configuration or license or permit type outputs in the future. All of the outputs must have the ability to be different for each of the Municipalities using the system.	High		

Req #	Requirement Statement	Priority	Response	Effort
	Bidder: Type your Vendor / Company Name One on the Bidder Instruction Pages			
7.029	The system must have the ability to print wall certificates suitable for display which include merged data from the licensee and license. The merged data on business/facility wall certificates includes the business name and business address.	High		
7.030	Licensees must be able to request and pay for a wall certificate online. This should be an online option offered at renewal time and also available at any time.	Medium		
7.031	Licensees may be able to alter some but not all of the license information upon renewal. For example, if the licensee wants to change description of operation they may be required to request that change to a Municipal Board/Department. Configuration capability must be able to accommodate protecting some fields from online customers during the renewal process. A request for a change of operation would involve typing that request in a different field and business rules would not allow for the automatic renewal before review by staff or perhaps a Board/Department.	Critical		
7.032	The system must include the ability to print a temporary license on demand which may have a different expiration date than the permanent license.	Low		
7.033	Licensees must be able to request and pay for Certified Letters of Registration online.	Low		
7.034	The system's certification letter request process must prompt for where the letter is to be sent as these letters are frequently mailed directly to a third party.	Low		
7.035	The system must merge the information on who the letter is being mailed to onto the letter along with other data from the licensee and license records.	Low		
7.036	The certification letter generation process must record who the certified letter of registration is actually being sent to and the date the letter was generated.	Low		
7.037	The system must be able to produce a report which is sorted and paginated by Board/Department code and shows the count of permit or license types in the Board/Department by license status. Flags used beyond the status code, such as those used to manage print status or audit status, may also need to be included on the report.	High		
7.038	The system must enable a licensee or permit holder to make requests for and pay for a duplicate license or permit online.	Low		
7.039	The system should be able to produce a report listing the licenses that have been RE-PRINTED within the same licensing period and when they were printed. (Replacement / duplicate licenses, not renewals.)	Low		
7.040	The duplicate license renewal process must request that the licensee confirm or update their contact information. This process would observe the business rules for allowing or disallowing address updates based on the license type that are defined elsewhere.	Low		
7.041	The duplicate license request process must display text to the licensee which explains that a new license will be generated with the same license number but a different serial number. They will be receiving a replacement license, not a copy of the existing license, and that the old license will be invalidated.	Low		
7.042	The system must produce a weekly license or permit printing summary report which shows the number of licenses printed per Board/Department per License type and the total number of renewal applications across the Board/Departments.	Low		
7.043	The system must be able to be configured to accommodate unique Board/Department and license type processes which may be used for other Board/Departments in the future.	High		
7.044	The system must provide the ability to search for permit or licensee & permit or license related records and return a list of records which match the specified criteria.	Medium		
7.045	The system must provide additional details of the permit or license record in response to clicking on a link from the search results list.	Medium		
7.046	The system must be configurable to require bonds for specific permit or license types and must be able to store surety bond information related to licenses including the bond issuer, the amount of the bond, and the bond expiration dates.	Medium		
7.047	If a bond expires the system must notify staff that the license may no longer be valid due to the expiring or expired bond.	Medium		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
7.048	The system should be configurable to send an email or letter notice to the licensee notifying them that their bond is about to or has expired and what action the need to take.	Medium		
7.049	The system must have the ability to relate multiple business to a corporate entity contact record (e.g. Motel / Hotel Chains related to a business, MacDonalds Franchise Owners, Property Owners with various properties, etc.)	Low		
7.050	The system must have the ability to track multiple office and branch office locations associated with a business or individual license.	Low		
7.051	The system should allow entity records to be created for each municipality (city / town), which can be associated with different license types (for example, with retail alcohol related licenses).	Medium		
7.052	The system should allow a variety of license types to be defined (such as for different retail alcohol related licenses), and for each type to be in a sub-category (such as if the license type is an On-Premise or Off-Premise type of alcohol license).	Medium		
7.053	Each municipality should be able to be associated with a quota of allowable licenses for different license types (for example, for types of retail alcohol licenses). The allowable quota is based on population and a staff member should be able to update the quota number. There should also be an indicator if the municipality does not issue licenses based on quotas.	Medium		
7.054	The system should allow a field to be defined for different license types (for example, retail alcohol licenses), which indicates in which municipality the license is located, so that permits or licenses per municipality can be easily counted.	Medium		
7.055	The system should be able to produce a report of all permits or licenses by type within each municipality.	Medium		
7.056	The system should be able to produce all renewal notifications by license type for each municipality.	Medium		
7.057	The system should allow a field to be defined for different types of licenses (for example, for retail alcohol licenses) that indicates if the license was granted under the municipality's quota or is based upon another method (for example, based on special legislation).	Medium		
7.058	The system should display a warning message when a license application is entered which, if granted, would exceed the quota allowed in the license's municipality.	Medium		
7.059	The system should produce a report which indicates, for each municipality, its allowable quota of licenses, the number of licenses, per sub-category issued under each quota, and how many under special legislation. The report should also display the number of licenses available per municipality. This report should be available to the public via a dynamic on-line Web page.	Medium		
Req #	**Bidder Comment / Note About Response Above**			

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
8.001	The system must enable an end customer to renew over the internet.	Critical		
8.002	End customers must not be available to renew online more than a set number of days prior to their expiration date.	Critical		
8.003	The system must integrate with the a variety on electronic payment vendors to allow online renewals to be paid for and to give municipalities flexibility.	Critical		
8.004	The system's online renewal process must allow the end customer to save their renewal process and return to it at a future time.	High		
8.005	A reminder email notice should go out to the end customer that they have a renewal in progress that they need to complete online after a set number of days.	Medium		
8.006	An incomplete online renewal should be considered abandoned after a set number of days such that any data saved in the partially complete renewal process can be dumped.	Medium		
8.007	If the renewal remains incomplete when the expiration date arrives, the licensee should be moved to Lapsed status as if no renewal process had been undertaken at all.	Medium		
8.008	The online renewal process must prompt the end customer to confirm or update their address and other contact information.	High		
8.009	Some facility licenses cannot change their primary address online as a change of address will require re-licensing & inspection. They should be required to confirm that their facility address is correct or not. They could update / provide alternate addresses other than the actual facility address.	High		
8.010	The system's online renewal process must indicate to the licensee if they have been selected for audit. The licensee should be prompted to upload or provide any required documents and/or input required information to assist with the audit.	Low		
8.011	Renewals entered by the licensee through the Web Interface must be configurable to fully process automatically, without human intervention, or be configured to be sent to an internal work-list, awaiting final approval by a staff person. In some cases where none of the renewal information has changed or automated checks confirm for example a new vehicle license plate for a Beach or Disposal sticker matches the owner then a staff person may not have to be involved at all except to print and mail the renewal.	High		
8.012	The online license renewal process must display a list of affirmations for the licensee to click on and indicate that they agree to the statements as part of the license renewal process. The affirmations vary by Board/Department and License type.	High		
8.013	The renewal process must display all the fees due in order to renew including renewal fees and late fees. Fees will vary by Board/Department and license type.	High		
8.014	The system must display the expiration date for each license as part of the licensee's data online.	High		
8.015	The renewal process must indicate what the next calculated expiration date will be based on the renewal cycle for this license type.	High		
8.016	When all required steps in the renewal process are complete, the system must automatically update the status of the license, update to the new expiration date, and send the license to be printed.	High		
8.017	The renewal process should offer the licensee an opportunity to purchase additional optional items such as wall certificates and pay for them at the same time as their renewal.	Low		
8.018	The system must have the ability to configure licensee checklists and workflow for recurring interim license reviews and renewals in addition to initial applications.	High		
8.019	The system should allow licensees to enter and update required staff information working at the facility beyond the key individual. (ex. Those handling alcohol have had TIPs training) Attaching a printout is also a possibility.	Medium		
8.020	The system must give a licensee the ability to view his/her own data for tracking the status of their license renewal online. Status indicators would include information about the status of the license printing.	High		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
8.021	The system must track license renewal periods which vary per Board/Department and license type and accurately calculate expiration dates based on the renewal period in conjunction with other data elements based on the Board/Department's rules.	Critical		
8.022	The system must have the ability to set renewal dates based on criteria defined in business rules per Board/Department and license type such as: • Renewing on a specific date of the year • Pro-rating the next renewal year based on the license grant date	Critical		
8.023	Regardless of the formula for setting the next renewal date for a license, no license should ever be set to renew on February 29th of any year.	High		
8.024	The system must be configurable per license type so that business rules can be configured to limit the total number of times a license can be renewed. (e.g. Some Board/Department issue temporary licenses which have a short renewal cycle measured in days and have a limited number of extensions.)	Medium		
8.025	The system must generate email and hard copy renewal notifications, as part of an automated batch process and part of an on-demand process.	Critical		
8.026	The system must store the text for renewal application notifications which are unique for each Board/Department and license type.	High		
8.027	The system must be able to print both renewal application formats which are used by the Board/Departments; one is two pages long and the other is three pages long. They must be printed in two separate batches.	Low		
8.028	Each page of a printed renewal application must include an optional machine reader (OMR) line indicator for the folding machine to use when determining when to start a new packet. The first page of a set must have two consecutive marks. The subsequent pages of the same set have one mark. The OMR lines go in the upper left corner of page. There has to be a clear zone at least an inch wide down 4 inches from the top of the page on the left side. The distance between the top of the page and the first mark must be a minimum of 1/2 inch and must be the same on every page. The mark must be at least 5/8 inch from the left side of the form. The marks need to be at least a half inch long and the space between them is 1/8 of an inch; a standard 8 1/2 x 11 inch page is divided into 88 cells.	Low		
8.029	The system must be able to generate separate batch print jobs for renewal applications where the licensee has been selected for audit. These separate jobs allow for hard copy inserts to be added to the outgoing mail for an entire batch of renewal applications.	Low		
8.030	The system must generate an initial hard copy or email renewal notices according to the licensee's indicated preference for communication method, 90 days prior to their license expiration date.	High		
8.031	The system should generate a hard copy renewal application for any licenses not yet renewed a set number of days prior to their expiration date and which received electronic notices.	Medium		
8.032	The system must print a scan line at the top of all hard copy renewal application coupons which can be read by the lock box scanning equipment. The scan line is printed in OCRA font and includes information on the Revenue org code (where to credit the money), the Board/Department/department code and type class, the license number, the deadline date = license renewal date + 5 days, and two dollar amounts; how much money is owed before and after the deadline date (late fees are added after the deadline).	Low		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
8.033	The scan line output on the renewal application coupon must include three check digit characters calculated using a version of the Modulus 10 algorithm. The check digits are included in the scan line in order to validate data values in the scan line. 1. The first check digit is for the license number. 2. The second check digit is for the renewal date. 3. The third check digit is for the whole scan line.	Low		
8.034	The system must have the ability for staff to generate a single hard copy renewal application for any licensee. This would be considered a 'duplicate renewal' and might be needed in the case that a renewal application has been lost.	High		
8.035	The system must facilitate printing customized duplicate renewal coupons in case one is needed for an expired license. The duplicate renewal must include a scan line for the lockbox bank at the top but some of the values will need to be customized. • Additional renewal fees must be assessed as necessary to account for the expiration. • The new total of fees due must be reflected in the scan line for the after the late date amount.	Low		
8.036	The system must have the ability to randomly select licenses to be inspected from the pool of licenses to be renewed based on specifying a number of licenses or a percentage of the total licenses in the renewal pool for that Board/Department & license type.	Low		
8.037	The system must flag the fact that licenses have been selected for inspection and kick the inspection process. A municipality may choose to inspect all of a particular license type rather than doing the inspection randomly to save money.	High		
8.038	The system must be configurable per license type to manage additional fees and process for Lapsed & Expired Licenses.	High		
8.039	A license that is not renewed by its renewal date plus a specified number of days grace period is considered Lapsed. The system must automatically update the status of the license.	High		
8.040	The system must be configurable to charge late fees on renewals conducted after a license has lapsed but within the first renewal cycle. Lapsed licenses can be renewed through the usual process with the addition of paying the late fee.	High		
8.041	A license that has not been renewed within one cycle is considered to be expired. The system must automatically change the license status to expired. For example a license due to renew on 2/1/11 that has a one year cycle and is still not renewed by 2/1/12 is considered to be expired. This rule applies to most but not all Board/Departments and license types. Some Board/Departments have a different time period for moving a license from lapsed to expired.	High		
8.042	The system should be configurable for a reinstatement workflow. Some Board/Departments follow reinstatement processes for expired licenses which require more than paying a fee for a lapsed license renewal and are often similar to a re-application process.	Medium		
8.043	If a licensee attempts to renew an expired license online, the licensee user interface must indicate "Your license has lapsed for more than one renewal cycle and has expired. You are not eligible to renew online. Please contact the Board/Department to initiate a reinstatement process."	High		
8.044	The system must provide a summary report for how many licenses are due to renew during a specified time period. The data must be grouped and summarized by Board/Department and License Type.	High		
8.045	The system must allow license renewal fees for selected licenses to be waived. The license must be allowed to renew by completing the information steps associated with renewing but would not require a payment.	High		
8.046	The system must produce a weekly renewal summary report which shows the number of renewal applications printed per Board/Department per License type and the total number of renewal applications across the Board/Departments.	High		

Req #	Requirement Statement	Priority	Response	Effort
Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
8.047	The system must be able to produce a report showing any business or school licenses where the associated key individual's license has lapsed or expired.	High		

Req #	Bidder Comment / Note About Response Above

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				

Req #	Requirement Statement	Priority	Response	Effort
9.001	The system must be able to relate inspections to permits and licenses and the system must record and display all the details of an inspection including: • the license or permit number the inspection is associated with • the licensee or permit holder name the inspection is associated with • the physical address of the property • the individual at the property/business that the inspector actually communicated with • the key individual associated with the property/business permit or license (if any) • the inspector conducting the inspection • the date of the inspection • if a violation was found or not as a Boolean or Y/N type value the nature codes of the violations found (if any) • ticket number if one is issued • amount of ticket if one is issued • the Reason for the inspection (e.g. general, new business, complaint, follow-up)	Critical		
9.002	The system must allow documents and photographs to be uploaded and connected to Inspection records. Each uploaded document must have a date and description associated with it.	High		
9.003	The system must allow for an inspection form or checklist to be configured for each property/business license or permit type and each inspection type (e.g. new application, complaint, renewal, etc.) each with its own checklist of items to be reviewed.	High		
9.004	The system must be able to record individual permits or licenses which are examined as part of the property/business inspection and whether or not a violation was found related to the individual permit or license.	High		
9.005	The system must allow free text entry notes or comments to be entered by Inspectors as part of inspections records.	High		
9.006	The system must allow for the definition of required inspections by license or permit type.	High		
9.007	The system must secure inspection data such that it can only be edited by specific user roles but is visible to other staff users.	High		
9.008	The system must maintain an inspection history related to each property/business.	Critical		
9.009	A summary history of inspections associated with each license or permit should be easily visible on the permit or license screen. The summary should include the date of the inspection and the outcome (passed or violation noted) and a quick link to be able to open a screen with the detailed inspection information.	High		
9.010	The system must be configurable by license or permit type to issue automatic reminders for the next scheduled inspection of a property/business to be done. (e.g. one year since the property/business was last inspected.)	High		
9.011	The system should provide investigator and inspector calendars to manage workload and view team activities.	Medium		
9.012	The mobile version of the system should allow inspectors/inspectors to schedule appointments with licensees or permit holders.	Medium		
9.013	The system should allow staff the ability to see the history of scheduled appointments, inspections and outcomes associated with a license, permit or complaint.	Medium		
9.014	The system should allow inspectors to view their individual schedule on the web based application and the field application.	Medium		
9.015	The system should allow individual inspectors to print their daily schedule.	Medium		
9.016	The system must allow supervisory inspectors to view and manage the calendars of their staff members.	High		
9.017	The system must be configurable so that ticket forms can be defined per Board/Department and property/business, license or permit type.	High		
9.018	The system must issue unique ticket numbers per Board/Department for each ticket written.	High		
9.019	Entry of ticket data must automatically open a Service Request and when there is a fine assessed, create a receivable for accounting to receipt against when the payment arrives.	Low		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
9.020	The system must manage the process of an inspection due to a license application, renewal request, periodic inspection or permit.	High		
9.021	The system should integrate workflow / checklist capabilities with inspections such that if an inspection is a required step towards licensing or permits the item can be checked off automatically as the inspection is completed and approved, requests for inspections based on applications or other processes will appear on appropriate investigations work queue, etc. If multiple departments are involved in inspections or sign offs the next set of inspections will appear in the next departments workflow.	High		
9.022	The system should be able to 'date stamp' a license or permit application related inspection request and to help manage the process of insuring the inspection occurs within the appropriate time frame of the date stamp as defined by each municipality.	Medium		
9.023	The system must manage the process of an inspection being requested due to a complaint.	High		
9.024	The system must be configurable to issue an automatic request for a property/business to be inspected within the probationary time period when a property/business license or permit is put on Probation status as a result of a complaint.	Low		
9.025	The system should make permit, license, inspection, and complaint data available for staff to query and view via mobile devices such as iPhone and Droid based products.	Medium		
9.026	The system must include a user interface for mobile devices for functions that are not conducted in the municipalities office such as inspections, investigations and public safety events.	High		
9.027	The mobile inspection application must allow the inspector to issue a ticket to a property/business on-site at the time of inspection. This would include assessing a fine, collecting a signature (probably on a touch screen) and printing a copy of the ticket for the property/business owner.	High		
9.028	The system must automatically and frequently synchronize permit, licensing, inspection, GIS and ticket related data from mobile devices to the central home database where wireless connection is available.	High		
9.029	The mobile system must perform batch updates from mobile devices to the main database when mobile device is connected to the network in case wireless connectivity is not available.	High		
9.030	The mobile and desktop versions of the system must allow the inspectors and inspectors full access to view all relevant information for their assigned cases including permit, license and application data.	High		
9.031	The system should offer GIS functionality to locate properties as part of mobile inspections.	Medium		
9.032	The mobile system should be able to integrate with existing GIS application giving users access to all GIS information they need for inspection purposes.	Medium		
9.033	The mobile system should allow an inspector to select records within a radius or draw a boundary.	Medium		
9.034	The mobile system should create GIS maps that display the location of queried data.	Medium		
9.035	The system must have reporting capability so that properties can be selected based on geographic location (e.g. town, zip code, other methods), board/department type, permit / inspection /license type and indicate if and when the property/business was last inspected.	High		
9.036	The system must be able to produce a report listing licensed properties in a selected board/department and/or license type which have not been inspected since a specified date. The results must be sortable into a geographical order.	Medium		
9.037	The system must be able to produce a report listing licensed properties which have never been inspected. Data must be selectable by Board/Department and by license type. Data should be sortable into geographic areas.	Medium		
9.038	The system must be able to produce a report with data selected by Board/Department and property/business license type which lists all the properties grouped by town or subsection of town and sorted by business name.	High		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
9.039	The system must be able to produce a report showing the number of inspections done per Board/Department and per license/permit type during a specified date range. The default date range is the fiscal year.	High		
9.040	The system must be able to produce a report showing the number of inspections done per Inspector during a specified date range. The default date range is the fiscal year.	High		
9.041	The system must be able to produce a report with data selected for all Boards/Department or by Board/Department and selected between dates for properties which have received tickets in the past. Data would include the name of the property/business, the dates of the inspections/tickets, the nature of the violations, the ticket number, the amount of the ticket, and the inspector who performed the inspection.	High		
9.042	The system must provide the ability for Staff to search for inspections by specifying various criteria including: • Board/Department • Permit/License Type • Ticket number • Permit/License number inspection is associated with • Licensee/Permit holder or Individual name inspection is associated with • Inspection date • Geographic area • Zip code • City or Town or Village name • Street Address • Inspector	High		
9.043	The system must be configurable to allow Inspectors to generate, view and print inspections related reports.	High		
9.044	With a single set of physical or logical databases the system should allow for assigning an inspector work from multiple municipalities. The inspector's calendar and availability should be the combination of work from the multiple municipalities.	High		
9.045	The system should allow Inspectors to be assigned to Boards/Departments/Inspection Types and geographic areas such that new requests or reminders for inspections can be automatically assigned to the appropriate Inspector's work queue.	Medium		
Req #	**Bidder Comment / Note About Response Above**			

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
10.001	The system must be able to accept and track both on-line payments and over the counter payments made by check, money order or cash.	Critical		
10.002	Fees received in the physical office in the form of checks, money orders or cash must be able to be manually entered to the system by staff.	High		
10.003	Credits for fees received from on-line transactions must be entered automatically by the system.	Critical		
10.004	The system must be able to identify the source of every payment entered to the system. For instance lockbox, e-payment, OTC (Over the Counter) check or cash.	Critical		
10.005	The system must facilitate the reconciliation of bank and credit card deposits statements by Treasury Departments.	Critical		
10.006	Payment tender reports should break down payments by Cash, Checks and Credit Card and Credit Card Type. Certain credit card transactions clear with different lag time causing problems with reconciliations if they credit card types cannot be split out.	Critical		
10.007	The system should be able to generate an revenue turnover report to facilitate the handover of cash, check and credit card information to a Municipalities Treasury Department.	Critical		
10.008	The system should be able to generate a daily export file that can be imported into Financial Management systems such as Munis, Vadar, Softwrite and others used in the region.	Medium		
10.009	The system must perform accurate calculations related to assessed fees and receipted funds.	Critical		
10.010	The system must be able to track the set dollar amount of fees to be charged for: • applications, licensing, and renewals by Board/Department, License, Permit, Inspection and other types: • late fees • duplicate licenses / permits • certificates • certified statements • returned checks • records requests	Critical		
10.011	The system must be able to track multiple versions of the same fees with different amounts, distributions to accounts, effective dates, and expiration dates. The appropriate fees must be assessed based on the date. This includes ensuring dollars associated with an individual municipality are directed to that municipality.	High		
10.012	The system must have the ability for staff to assess fines related to tickets and complaints.	High		
10.013	The system must provide the ability to track payments of fines and relate the payments to the ticket / complaint to which the payment applies.	High		
10.014	The system should be able to set up and track payment plans for large fines assessed in the course of Enforcement processes.	Medium		
10.015	The system must be able to receipt multiple payments over time and correctly apply them to one fee assessment.	High		
10.016	The system must allow fines associated with tickets or complaints to be paid by licensees, property owners, tenants, permit holders in full or in part, through an online process. Multiple payments may be made over time in order to fulfill the entire amount of the fine.	High		
10.017	The system must maintain auditable information on each financial transaction including: • Board/Department Code • License, Permit, Inspection Type • License/Permit number / Service Request number transaction is related to • Type / Category of Fee (e.g. application fee, renewal fee, etc.) • Transaction date • Dollar amount • Source of transaction (e.g. lockbox, e-pay vendor, OTC, etc.)	High		
10.018	The system must allow 3rd parties to pay for licenses and renewals on behalf of others. (e.g. a contractor on behalf of the property owner.)	High		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
10.019	The system must keep track of who made the actual payment and allow their information to be entered as part of the OTC receipting process in case the payee is different than the licensee.	High		
10.020	The system must provide the ability to search for receipts and adjustments made by the following criteria: • Receipt number • Transaction between dates • License/Permit/Inspection number transaction is associated with • Service Request number transaction is associated with • Transaction amount • Limit by results selected by the source of the transaction • Applicant / Licensee / Permit name • Ticket number	Critical		
10.021	The system must integrate with a PCI compliant e-payment vendor.	Critical		
10.022	The application must never process, transmit, or store any licensee payment related information such as credit card data, debit card data, and bank account data.	High		
10.023	The system's integration with the e-payment vendor should be invisible to the end-user who is submitting payments.	Medium		
10.024	The integration to the e-pay vendor must be accomplished as a pass-through service where the amount owed and an identifier for the transaction will be handed off from the system to the e-pay vendor and the e-pay vendor will return a confirmation of payment along with the transaction identifier. No payment related information, such as credit card data, debit card data, and bank account data will be transmitted from the system to the e-pay vendor.	High		
10.025	The system should allow for transactions to be accumulated in a shopping cart to allow convenience for the customer. However, the process must allow for spitting revenues associated with a fee to the individuals departments and department accounts and possibly between municipalities.	High		
10.026	The system should allow for configuration to force the separation and prevent placing certain transactions in a shopping cart if the system cannot split revenues across municipalities or across departments.	High		
10.027	The system should be configurable so that the convenience fees to be charged can be specified in a number of different ways: • Absorbed by the municipality if that is their choice or passed on to the customer • Specify a convenience fee amount with each fee recorded in the system. (e.g. per license, permit, and inspection application fee, per renewal fee, per fee for a certified letter, etc.) • Specify a flat fee to be charged per transaction. • Specify a calculated convenience based on the amount of license related fees • A percentage of the fee amount • A flat fee based on the fee amount (e.g. $5 per every $100 of fees charged)	Medium		
10.028	The online payment process should be configurable such that a select payment method step can be inserted prior to actual payment. The payment method step screen might be configured as follows (for example): "Please choose your payment method" • ACH - there will be an additional convenience fee of $0 using this method • Visa - there will be an additional convenience fee of $0 using this method • Other Credit Card - there will be an additional convenience fee of 0% of the total fees using this method	Medium		
10.029	The system must be able to correctly assess and receipt fees related to applications. Application fee amounts and fee structures vary by board/department and license, permit and inspection type.	Critical		

10.030	The system must be configurable to two different application fee models:
	1. Fees are paid as one all inclusive payment.
	2. Two separate payments of fees:
	  • Fee is paid at the time of application.
	  • Fee is paid once the application is approved to be issued but before the license or permit is issued.
		High		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
10.031	The system must be configurable per Board/Department and license type to calculate pro-rated licensing fees based on the date the license is granted to an applicant and the next (fixed) renewal date.	High		
10.032	The system must be able to receipt over the counter payments of application related fees against the appropriate application.	High		
10.033	They system must offer printing of a paper receipt or emailing a receipt to the payee as options in the online payment and OTC receipting process.	High		
10.034	The system must be able to allocate funds from one check to fees on multiple licenses or permits.	High		
10.035	The system must be able to correctly allocate receipt amounts to multiple assessed fees related to one license/permit or inspection (e.g. one check to pay for a renewal fee and a late fee).	High		
10.036	The system must be able to correctly assess and receipt fees related to renewals. Renewal fee amounts and fee structures vary by board/department/municipality and license/permit/inspection type. Late fees are assessed on outstanding renewals which have aged past their expiration date.	High		
10.037	The system must be able to allocate payments into various trust and operating accounts based upon percentages or fixed dollar amounts of the fine or fee being paid.	High		
10.038	The system must import a daily file from the Lockbox bank, marry the renewal payments to the appropriate licenses, and automatically update the license status for those licenses based on the payment and other indicator codes in the Lockbox file.	Low		
10.039	The lockbox import process must match payments to the appropriate license and validate several factors to insure that the license can be updated. The following conditions would prevent a license from being automatically renewed. • If the license is in expired status, report it to appropriate staff for further attention. • If the payment amount is less than or more than the amount assessed for renewal. • If the bond expiration date on the property or business has expired.	Low		
10.040	The system must record the date of the payment (cash date) and the cash number provided in the Lockbox file with the payment amount.	Low		
10.041	The system must apply the payment to the appropriate renewal and late fees. There may be multiple cycles of renewal fees due. All fees must be paid to allow renewal to proceed.	High		
10.042	The workflow / checklist requirement for a payment to be made for renewal must be automatically checked off / updated. (If all requirements are now met, proceed to print the license.)	High		
10.043	If the lock box file indicates that an address change appears on the coupon, the license record must be flagged for attention by the import process. Staff will manually input the address change that is written on the coupon. DO NOT allow the license to be printed if an address change has been indicated until the new address has been input and the 'address to be updated' flag has been removed.	Low		
10.044	The system must produce a Daily Fee report at the end of the lockbox file import process which shows all lockbox receipts grouped by board and license type and indicates the distribution of funds between the board operating funds and trust funds.	Low		
10.045	The Daily Fee report must also be able to be produced on demand based on specifying between dates and selecting some or all sources of receipting.	Low		
10.046	The system must produce a Records Listing Report showing a list of all the payments received through the lockbox process where there were no errors. The data must be sorted and grouped by Board and license type.	Low		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
10.047	The system must produce an Error Records Listing Report showing a list of the payments received through the lockbox process which were processed with outstanding issues or which could not be receipted. The report must include information about the payment record and the 'error' condition encountered. Records processed with issues includes: • Records where the lockbox bank indicated an address or name change on the face of the coupon. • Fees paid to the lockbox were less than fees assessed for renewal. Records unable to be processed: • License number of payment record could not be matched to a license record in the system • Licenses which were not in a status eligible to receive a renewal payment. • Payments where the amount received by the bank is greater than the fees assessed for renewal.	Low		
10.048	The system should allow staff to query for the set of records which were flagged by the lockbox process for address or name changes on a given day, and to make those changes efficiently without changing screens.	Low		
10.049	The system must allow Accounting staff with appropriate security access to make debit and credit adjustments to fee assessed and fee amounts receipted.	High		
10.050	Each financial adjustment in the system must record the user making the adjustment, and include the date and a required notation as to the reason for the adjustment.	High		
10.051	The system must allow automated renewal fee assessments to be manually adjusted in order to accommodate reinstating expired licenses where fees may be negotiated.	High		
10.052	The system must allow accounting staff to assess additional fees in order to receipt money orders made out for more than the assessed fees and allocate the overage funds correctly.	High		
10.053	The system must be able to track overpayments and refunds.	High		
10.054	The system must have the ability to easily and automatically back out a payment made on a check that is later returned for non-sufficient funds.	High		
10.055	The system's returned check process must automatically assess an additional fee for the returned check which must also be paid before the license can be renewed or issued.	High		
10.056	The system must provide the option to send a notice (letter and/or email) to the payee and/or licensee concerning the non-sufficient funds.	High		
10.057	The system must keep track of all returned checks from an accounting perspective so that they can be searched / reported on as needed.	High		
10.058	The system should flag each licensee who has had a returned check in the past and display an alert on the receipting screen when that licensee is selected.	Medium		
10.059	The system must provide a process whereby staff can take one step to roll-back to a previous license expiration date and status in case the lockbox or other process has incorrectly updated the license or in case a check is returned.	Medium		
10.060	The system must be able to produce a printed deposit slip per Board/Department per Day. The deposit slip must show all OTC checks and cash receipted for a given board/department on a day and correctly calculate the total deposit. This deposit slip is submitted to the bank with the checks.	Medium		
10.061	The system must be able to produce a report showing quantities of licenses active and renewing by board summarized by quarterly time periods for data within a selected time period. This information will be used to project revenue for budgeting purposes.	High		

Req #	Requirement Statement	Priority	Response	Effort
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10.062	The process of updating addresses and other data related to lockbox coupons must be facilitated and made as efficient as possible using a minimum number of screens, a minimum number of search and navigation steps, and an efficiently laid out screen for data entry and adjustments. This work is currently done on a very fast terminal server and the effectiveness of that interface must be reproduced as closely as possible in the new application.	Low		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**	
11.001	The system must accommodate multiple types of licenses, permits, certifications, etc., each with their own expiration dates, possible restrictions, unique numbering systems, etc.	Critical			
11.002	A trained and authorized Municipal employee must be able to easily update the system with new license and permit types and must be able to configure business rules and procedures for granting and renewing licenses, for handling inspections, for service request tracking, and for discipline tracking.	Critical			
11.003	Drop-down menus and tables in the system must be configurable by local administrators, as necessitated by changing statutes, regulations, case law and/or efficiency related purposes.	Critical			
11.004	The system must allow adding new fields and searches as required, without custom development or added cost.	Critical			
11.005	The system must include a development environment, a test environment, and production environment, along with the ability for change control.	High			
11.006	The system must include the capability to configure and test a license, permit or inspection type in the dev/test environment and then migrate the configuration to the production environment in an automated fashion without re-creating the configuration manually.	High			
11.007	The system should include the capability to copy an existing license and permit type configuration as a basis to make a new license or permit type in order to gain efficiencies in configuring new licenses or permits.	Medium			
11.008	The system should include the capability to copy an existing workflow process to another license or permit type.	Medium			
11.009	Commonwealth security standards define "personal information" as the first name and last name or first initial and last name in combination with any one or more of the following data elements that relate to them: • Social Security Number; • Drivers license number or state issued identification card number; or • Financial account number or credit card number with or without any required security code, access code, personal identification number or password that would permit access to the individual's financial account. Date of Birth (DOB) is not considered to be 'personal information' for the purposes of licensing.	High			
11.010	Individual Social Security numbers are sometimes used as the FID / FEIN for business licenses and so that data must also be considered both personal and sensitive information for the purposes of the application.	High			
11.011	The system must include reasonable and prudent measures to isolate sensitive data from open access. For example, storing it on a separate back-end database server accessible only from a front-end server that has been diligently protected and/or by encrypting the data which is identified as sensitive. Social Security numbers and data in the FID/FEIN field are considered to be 'sensitive data'.	Medium			
11.012	The system must allow the full SSN or FEIN to be input and stored. Role based user security in the system must be set to mask the SSN/FEIN data to allow visibility to only the last four digits for most of the staff. Only a select few can see the entire number.	Critical			
11.013	The SSN / FID / FEIN must never be displayed to the public on the Internet.	High			
11.014	The system must log any changes made to the SSN / FEIN with the date, time, the actual change that was made, as well as who made the change. The system must also require the staff member to input a comment as to why the number was changed.	Medium			
11.015	A report must be defined which will list any edits (not new entries) made to the SSN / FEIN, indicate who made the change, and the licensee record that was changed. The report must allow changes to be selected based on a date range.	High			
11.016	The system should be able to encrypt selected sensitive data fields such as SSN and only allow users with appropriate security rights to decrypt and view the data.	Medium			
11.017	The system must provide workflow functions.	Critical			

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Req #	Requirement Statement	Priority	Response	Effort
11.018	The system should allow workgroups to be defined so that task work queues can be attended to by more than one staff member	Medium		
11.019	The system should allow a method for staff members to assign tasks from group work queues to themselves.	Medium		
11.020	The system should provide a method for supervisors to view, assign, or re-assign work queue tasks to staff members.	Medium		
11.021	The system must provide the ability to add automated business rules to workflow tasks, such as sending email based on status, sending notifications, compiling letter, etc.	High		
11.022	The system should allow administrators to configure and define escalation workflow rules based on definable work criteria.	High		
11.023	The system should include the ability to define and utilize types of reminders/ ticklers relating to a license/permit or to a case (e.g. make call, schedule hearing, verify document received, etc.)	Medium		
11.024	The system must provide a user interface such that the user can click directly to license or permit information, service request information, fee history, etc. for a given licensee or permittee, without entering a new query.	High		
11.025	The system must include a basic document management system.	Critical		
11.026	The EDMS system associated with the new application must allow documents in a variety of formats (such as PDF, Word, RTF, JPG, etc.) to be stored.	High		
11.027	The system must allow documents to be related / linked to various levels of records in the system including licensees, an application, a license, or a complaint.	High		
11.028	The list of documents associated with data in the system must be easily visible on the user interface screens they are related to.	High		
11.029	Native viewers may be used to actually look at retrieved documents, but the appropriate viewer must be automatically kicked off and open the selected document in it directly from the new licensing application.	High		
11.030	The system must be able to interface to an external full functionality document management system.	High		
11.031	For each import the system should log the file name, the source of the file, the number of records processed, the number of successfully imported records and the number of rejected records.	Medium		
11.032	The system must include a secure log-on and unique identifier for every staff user, vendor user, and licensee or permit user.	High		
11.033	The system user login & security should integrate with active server directory in order to allow for one-login for Municipal staff members.	Medium		
11.034	The system must have the option to enforce monthly password changes for staff users if they are logging directly into the application as opposed to being granted access via integration with existing network logins.	High		
11.035	The system should allow for enforcing minimum rule set for all user passwords into the system for example: 1. Passwords shall not be comprised of English or foreign language dictionaries. 2. Passwords shall be at least eight characters in length. 3. Passwords shall conform to at least three of the following conditions o Contain one or more upper case characters o Contain one or more lower case characters o Contain one or more numerals (0, 1, 2..9) o Contain one or more (non-alphabetic and non-numeric) special characters (e.g. punctuation symbols or any of the #, $, %, ^, &, *) These password rules must be enforced any time a user password is set or re-set.	High		
11.036	All login or file access attempts must be recorded into a log and the log shall be retained as long as required in order to meet preventative detective and corrective control measures.	High		
11.037	The system must uniquely identify each user in the system by an ID number.	High		
11.038	The system must allow or restrict, by user and group, the ability to access and or update data.	Critical		
11.039	The system must allow role based security settings which can allow or disallow viewing and editing of individual data fields.	Critical		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
11.040	The system must allow role based security settings which allow or disallow users access to functional areas of the application (e.g. accounting, service requests, etc.).	Critical		
11.041	If a user does not have access to a functional area of the system, it should not appear on their user interface / menu.	Medium		
11.042	The system must allow system administrators to define what data is accessible to individual users by Board/Department. (e.g. Two staff members have the same security role but work for two different boards/departments. Each one should be granted access to the data only for the Board/Department they work for.)	High		
11.044	The system must provide the ability to configure speed optimized screen processes for frequent and repetitive data entry tasks.	High		
11.045	The system must create an audit trail of key fields where data is added, changed, or deleted. Key fields include: • Names • Date of Birth • SSN / FID / FEIN Numbers • License / Permit Number • Serial Number (printed on license or permit) • License / Permit Issue Date • License / Permit Expiration Date • License / Permit Status • Contact Information (address, email, phone #) • Application status • Service Request Status • Charges / violations • Decision codes • Disciplinary actions	Medium		
11.046	The system must have the ability to view & report on audit change tracking information including: • the License/Permit # of the record that was changed • the Licensee/Permittee name of the record that was changed • the Change that was made (what field was changed) • when the change was made • what the actual change was • who made the change. • the date the change was made	Medium		
11.047	Audit data to display on queries and reports should be able to be selected: • based on between dates • by board/department • by licensee / permittee name • by license / permit number	Medium		
11.048	The system should include the ability to query audit data by which key data field was changed (e.g. I want to see the list of all changes made to any SSN data between these dates): • Licensee / permitee name • License / permit number • Address • SSN • License / permit Status code • License / permit expiration date • Financial / monetary related data field	Medium		
11.049	System audit records must be selectable for viewing and reporting by the type and source of the change: • Edits only vs. new records added • Edits done manually by staff members • Edits done manually by licensees / permittees online • Additions done by import processes • Edits done by import processes (e.g. from lockbox, State)	Medium		
11.050	The system must maintain an audit record of any user who views a full, unmasked, social security number (SSN), FEIN, or FID number.	High		

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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
11.051	The system should have the ability to keep an audit trail and track changes made to any and every data field in the system.	Low		
11.052	The system should have the option to be configured to require supervisor review and approval on changes made to license / permit records by selected staff.	Medium		
11.053	The system must provide appropriate and secured user interfaces to allow Information Technology staff resources to perform administrative tasks such as defining security groups, creating user accounts, designing reports, building templates for data merge and outputs (letters, emails, etc.), adding custom data fields to the application, etc.	Critical		
11.054	The system should allow system administrators to make corrections and changes to any data field.	Medium		
11.055	The system must include a notes function whereby staff members may enter free form notes attached to the licensee, license, permit or service request.	High		
11.056	Only the original author of the note should be allowed to edit or delete the note except where administrative privileges may be granted to specific other individuals who have rights to edit & delete notes in the system.	Medium		
11.057	Notes should be readily visible on the screen when viewing licensee, license, permits or service request information.	Medium		
11.058	The note data must automatically include the date and time the note was originally entered and who made the note.	High		
11.059	The system must provide the ability to create custom data fields as follows: 1. Ability to designate custom data fields as mandatory or optional. 2. Ability to set a default value for a custom data field. 3. Ability to create a drop down list of options for a custom data field. 4. Ability to define a custom data field as limited to the drop down list or allow additional input. 5. Ability to set a data type for the custom field such as date, numeric, etc. 6. Ability to indicate fields are available for display to the public.	High		
11.060	The system must provide the ability to utilize custom data fields as follows: 1. Ability to build relationships / dependencies between delivered fields and custom data fields. 2. Ability to produce reports based on custom data fields. 3. Ability to search and query data based on custom data fields.	High		
11.061	The system must allow fields to be defined as required input or not for various user interfaces. (e.g. Staff interface, licensee on the web)	High		
11.062	The system should have an online help function for staff which is integrated to the application.	Medium		
11.063	System administrators should be able to add custom help messages and text to fields and screens.	Medium		
11.064	The system must provide global search capability to find records throughout the system.	High		
11.065	The system must provide flexible searching capability with ability to add new search fields.	High		
11.066	The system should allow query results to be easily and quickly exported to Excel by staff users.	Medium		
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Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
12.001	The system must contain the ability to build ad-hoc reports by trained, but non-technical staff members.	Critical		
12.002	The system must contain the ability for staff users to generate pre-defined reports with minimal user training.	Critical		
12.003	The system must not allow users to build or generate reports within the application which contain data that they do not have access to view.	High		
12.004	The system must have the capability to run and store reports for audit / archiving purposes.	High		
12.005	The system must contain the ability to develop fully configurable form letters, documents, and emails that can be saved for future use in a "document and forms library." The templates must have the ability to merge with information pulled from the system database, such as but not limited to name and address.	High		
12.006	System merge templates must be stored in a central repository. Templates can vary for each municipality.	High		
12.007	Standard letterhead type headers and footers should be stored & edited in one place (for information such as agency director, address, etc.) and then appropriately effect all templates.	Low		
12.008	Templates should be able to be designated as present for editing or not. A template designated as 'present for editing' would be merged and then opened on screen for the staff member to edit before printing or emailing the final version. Templates not designated for editing prior to send would be sent to the print or email queues automatically without being presented to the user for editing.	Low		
12.009	The system should keep an activity log of letters and emails that have been merged and sent to the licensee/permitee from the application.	Low		
12.010	The system should have the ability to designate templates as items which should or should not be recorded in the activity log. In general emails and correspondence would be logged but legal document templates would not be.	Low		
12.011	Merged emails and letters should be able to be automatically produced as part of a step in a workflow process or be triggered by data changes such as a change in status, marking an address as bad/expired, etc.	Medium		
12.012	Vendor or system can produce reports that will identify the number of users licenses by municipality for charge back purposes from The County to the individual muncipalities	Critical		
Req #	**Bidder Comment / Note About Response Above**			

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
13.001	Public web pages dynamically served by the system must be styled to look like each municipalities individual web portal.	Medium		
13.002	The system must allow web pages for online services to be configured or edited locally by agency system administrators as needed.	Critical		
13.003	The application must allow system administrators to define what data elements are and are not visible to the public and to licensees / permittees who are logged in.	Critical		
13.004	The application should allow public users of the web site to select from a list of the license / permit / inspection types including renewal or new applications	Medium		
13.005	The public facing web page text should be multi-lingual including English, Spanish and Portuguese. This could be accomplished using a free third party translation tool.	Low		
13.006	The system must allow administrators to create user logins and issue passwords for external users to access online functionality.	High		
13.007	The system must allow for self registration for use of the online functionality.	High		
13.008	The external web site must validate data entry in order to prevent errors. • Disallow numbers in name fields. • Validate the construction of the SSN • Insure FID have 9 digits • Validate the construction of telephone numbers • Validate zip codes having sufficient number of digits • Insure that the zip code and town/city match • Insure all required data fields are entered and not left blank or filled with spaces • Insure email addresses are correctly constructed with an @ sign with characters before and after and with a dot and appropriate extension (.com, .org, etc.)	High		
13.009	The system must allow the public to search for licenses or permits on the web by specifying various criteria including 1. Department 2. Business type 3. License number 4. Licensee name 5. Geographic method 6. Option to search for ACTIVE status licenses only	Medium		
13.010	The system should provide a variety of geographic methods to search for licenses and permits online. • Graphic map based • By City / Town name • By Zip code	Medium		
13.011	The system must allow system administrators to select what data will be displayed to the public on the web site and what will not. A limited subset of information will be made available to the public on the internet.	High		
13.012	The system should be able to display information on any disciplinary actions taken against the licensee or permit holder on the same screen with the detail licensee or permit holder information.	Low		
13.013	The system must provide a method for internet users to download or print the search results list.	Low		
13.014	The number of records that might be selected for download based on a search by a member of the public could be large. The application's process for providing the licensee / permit data via the web site must address concerns with the size of the files in some way.	Low		
13.015	The system should be able to display Geographic Information System information via the web without additional 3rd Party GIS licenses	Medium		
13.016	The system should display documents contained in Municipal Document Management system without the need have additional document management license from the document management vendor.	Medium		
13.017	The system should allow the option for electronic documents associated with permits or licenses to be declared accessible to the public such that they can be retrieved and viewed from a service request / complaint detail screen on the web site.	Medium		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**
Req #	**Bidder Comment / Note About Response Above**			

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages					
Req #	**Requirement Statement**	**Priority**	**Response**	**Effort**	**Comment**	
14.001	There is the potential that the result of the RFP process will be to choose the same vendor as is currently being used by other Municipal Agencies in the State. If the same system is chosen as is currently supported by your organization can the systems be merged into a single system, i.e. can the system use the same physical or logical database?	Medium				
14.002	Enterprise Level Requirements: The solution should be scalable, reliable, manageable, configurable, and provide high performance and throughput.	High				
14.003	Solution must support high-availability environments including capabilities for redundancy, failover, and system recovery.	High				
14.004	The system must be able to be backed-up using common disaster recovery strategies including snapshot and incremental back-ups to a variety of medium on a scheduled basis.	High				
14.005	The system must be implemented using multi-tier architecture. Multi-tier application architecture consists of multiple, well-defined and separate tiers, each running on a separate process, typically hosted on separate servers.	High				
14.006	System must support scalability and load for a user base of hundreds of Municipal Employees and thousands of public users per month.	High				
14.007	The system must be able to be installed and run in a VM Ware server environment.	High				
14.012	The licensee web interface must be presented and secured via a Secure Hypertext Transfer Protocol (HTTPS) – SSL, minimum 128 bit key length type of connection.	High				
14.013	The system and its database must integrate with a sophisticated reporting tool such as Crystal Reports for custom reporting capability.	High				
14.014	The system must have the ability to import and export data in a variety of standard formats, including fixed width, delimited, csv, xml, text, and Excel.	High				
14.016	The system must have the ability to easily integrate with MS Office products.	High				
14.017	The external web interfaces for public, licensees, and vendors must allow the use of various commercially available browsers including Internet Explorer ver 7+, Firefox ver 3.5+, Safari 4+, Chrome 11+	High				
14.018	The system must include a web browser interface to view data and system modules and components.	Critical				
14.019	Internal staff functions must be accessible using Internet Explorer version 7+.	High				
14.020	The staff user interface should work with commercially available browsers other than Internet Explorer specifically FireFox 3.5+, Safari 4+ and Chrome 11+ .	Low				
14.022	The system should be able to use MS SQL and Oracle at a minimum and possibly other RDBMS as the back end database of the product for future enterprise installation purposes.	Low				
14.023	All system staff related functions must be able to run on Windows 7 and Windows XP operating system.	High				
14.024	The solution should be compatible with Office XP, Office 2003, Office 2007 and Office 2010. The system must be compatible with these versions of Office applications.	High				
14.025	The system must be secure and support the following security related functionality:	High				
14.026	Application code must never run from a system level account with unlimited privileges such as "root" or "administrator".	Medium				
14.027	Public-facing application system code must never run from or operate out of the same directory storage location as the host operating system.	High				
14.028	Presentation / application components must be isolated from data storage. An untrusted endpoint must never be given the ability to be directly connected to internal data stores. One method of accomplishing this separation is through the use of controlled network environments (DMZ).	High				

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
Req #	Requirement Statement	Priority	Response	Effort	Comment
14.029	Adequate monitoring, logging and assurance mechanisms including the monitoring and notification and reporting of application usage, security events, faults, and system health are required to verify that security safeguards and controls are in place and in effect.	High			
14.030	System logs must be protected from tampering and unauthorized deletion.	High			
14.031	Security must be sufficient to insure that if multiple agencies choose to use one instance of the application, that one agency cannot view or update another agency's data.	High			
14.032	The licensee or permitee login screen provided by the system must use CAPTCHA or some similar acceptable method as part of the authentication to prevent automated attempts to log in to the system.	High			
14.033	The public facing dynamic web application page must include secure coding to prevent hacking attacks (SQL injections, XSS and other methods).	High			
14.034	The internal staff interface application web pages must include secure coding to prevent hacking attacks (SQL injections, XSS and other methods).	High			
14.035	All public facing application system sessions must have a mandatory timeout after some defined period of non-use.	High			
14.036	If a public facing system fails, the system must fail securely. The system must not fail exposed. For example all client sessions must be terminated, new connections must be disallowed, and any pending or incomplete transactions must not be committed until the failure has been effectively addressed.	High			
14.037	Data Leakage/Theft Security – The system must support a minimum of 128-bit encryption for all communication between components, all bidder products generated data, and temporary tables and files.	High			
14.038	Platform Hardening – The system must support platform hardening and not lose functionality on these platforms.	High			
14.039	The system must support the following methods of authentication: Windows Active Directory and Lightweight Directory Access Protocol (LDAP) v. 3.0.	Medium			
14.040	For enterprise implementation, the system may need to support additional methods of authentication including Novell, Sun, and x509 digital certificates.	Low			
Req #	Bidder Comment / Note About Response Above				

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement -- Optional Additional Module Understanding**	**Priority**	**Response**	**Effort**
15.001	The system must include the ability to manage the service request process through assignment, investigation, reassignment if necessary and resolution	Critical		
15.002	The system must issue a unique service request number to each issue which is classified as a service request in the system.	Critical		
15.003	The system must try to resolve service request that apply to the same property, location (e.g. pot hole) business, etc. The system must try to consolidate multiple request to the same problem/opportunity	High		
15.004	E-Mails or other notifications of status changes should be sent via e-mail to the end customer that reported the issue	High		
15.005	The system must track multiple important dates associated with each issue including: • Date the record was entered to the system • Date of the incident that the service request is about • Date the issue becomes a Staff Assignment • Date the issue officially became a service request • Date the service request is assigned to an inspector • Date the issue was Closed	High		
15.006	The system should allow a service request tracking activity log to be set up so that significant dates associated with activities can be tracked.	Medium		
15.007	The system must track the filing method of each issue. Methods include: • Hard Copy Form • Email • Online • Phone Call • Department Request • Ticket • Etc.	High		
15.008	Service requests must be able to be entered against unlicensed businesses or activities without permits, junk cars, excessive garbage, etc. The system must be able to record contact information with the service request.	Critical		
15.009	The system must maintain a limited list of codes in plain text and allow codes to be selected for each charge or request on a service request. The system must allow each code to be assigned a default priority level.	High		
15.010	Each service request must be able to have multiple issues associated with it. Each issue must have a code assigned to it.	Low		
15.011	The system must be configurable to track workflow specific to each incident.	High		
15.012	Each service request in the system must have a status flag indicated in plain language and based on a limited list defined to the system. Status codes are used for reporting & summary purposes and to indicate progress of the service request through the process within the municipality.	Critical		
15.013	The system must maintain a limited list of closure methods in plain text which can be selected from a drop down.	High		
15.014	The system must maintain a limited list of decision codes in plain text which can be selected from on closed service requests.	High		
15.015	The system must be able to record the start and end date for a license suspension and reference this information intelligently when running batch processes related to license renewals.	High		
15.016	The system must be able to record if a license surrender is permanent or for a period of time and record the time period for the surrender. Batch renewal processes must reference this information and apply it intelligently.	High		
15.017	Each service request/complaint must have a flag which indicates if the decision on the service request has been appealed as well as the date it was appealed.	Low		
15.018	The system must allow documents, photographs and audio files to be uploaded and connected to the service request.	High		
15.019	The system should have the capability to merge or combine two Staff Assignments into one in case they are identified to be duplicate issues.	Medium		
15.020	The system must allow visibility to Staff Assignments to be able to be secured to specific user roles and to be allowed for visibility or not based on the status of the Staff Assignment.	High		
15.021	The system must provide the public the ability to register a service request online.	High		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement -- Optional Additional Module Understanding**	**Priority**	**Response**	**Effort**
15.022	The online service request submission process must allow the user to save the service request process and return to complete it at a future time.	High		
15.023	The system's online service request process must collect and require contact information for the complainant. Depending on the municipality anonymous service requests may or may not be not be accepted through the online service request logging process.	High		
15.024	Any partially completed service request entered online must expire after a period of time (# days) and the information can be purged.	High		
15.025	If the service request is not completed and submitted online, the system must send an email notice to the complainant to let them know their service request will be considered abandoned after a designated amount of time and that the information entered so far will be deleted. The email must also indicate how they can return to the service request online in order to complete it.	High		
15.026	A new service request submitted online must trigger a notice that there is a new service request to be reviewed in the appropriate supervisor or directly to staff depending on the business rules.	High		
15.027	The system's online service request entry process must provide an opportunity for the customer to upload documents or pictures related to the service request. These documents might be uploaded as part of or after the initial service request submission.	High		
15.028	When a service request is submitted online, the system must send an email to the customer confirming receipt of the information and informing them how to return to the service request online in case they need to submit additional information or check the status.	High		
15.029	Once a service request is submitted online the system process must offer the requestor an opportunity to print a copy of the service request. This print out would be suitable to sign and mail into the Municipality, to print and use as a cover sheet for the submission of additional hard copy information, or to keep for their own records.	High		
15.030	The system must assist the end customer to identify the appropriate licensee, property or GIS location that they wish to file a service request by guiding them through a process of identifying the area such as using the GIS location available through a mobile phone.	Medium		
15.031	The system's online service request form must allow the customer to free form enter the name of the business, property or other entity they wish to file a service request against if they are unable to locate them as a specific licensee or property or GIS location.	High		
15.032	The system must include a process for triaging issues, assigning them to a particular staff member, department or closing them if for example there is a service request related to a federal, state or private road that is not the responsibility of Municipality.	High		
15.033	The system must assign a sequential number to each issue entered to the system for triage.	High		
15.034	New service requests entered to the system by staff or online must be assigned to a staff member's or department's for review and triage.	High		
15.035	The system must include the ability to relate two or more service requests to each other. Preferably this would be done automatically if a match can be made or manually if an automated match cannot be made.	High		
15.036	When assigning a service request to a staff member or department the system should display which staff member or department has been assigned to an open service request.	Medium		
15.037	The system should capture key statistics about the license, permit, business or property that a service request is related to based on the incident date of the service request. This information should be stored with the service request so that it is not affected when the related licensee, business, tenant or other information changes overtime.	Medium		
15.038	The system should display a list of related service requests on the licensee, property, request not related to a business or property such a request for an annual report. The service request screens with a quick link to see the details of the listed service request. The displayed information should include the service request number, the date of the service request and the service request status.	High		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement -- Optional Additional Module Understanding**	**Priority**	**Response**	**Effort**
15.039	The system must include the ability to define and log types of events, actions and documents to choose from and enter in a variety of event logs. (e.g. phone call, document received, letter sent, hearing, conference, etc.)	High		
15.040	Event log items in the system must include the date, a selected action, document or event from a pre-defined list, the staff member who took the action, and a free form text description of the action.	High		
15.041	The application must provide an action log for each service request which will allow municipal staff to record the actions they take.	High		
15.042	The municipal staff action log must be readily visible from the service request screen. The action log default sort order should be the most recent action at the top.	High		
15.043	The ability to enter events to the log must be secured and limited to specific user roles for municipal staff.	High		
15.044	The system should provide a method to relate electronic documents to specific entries on the municipal staff action log.	Medium		
15.045	The system must provide the ability to print the municipal staff's action log. The sort order is the earliest event first.	High		
15.046	The system must provide an action log for each service request which will allow Boards or Commissions to record documents received, events, and actions taken.	High		
15.047	The action log must be easy to navigate to from the service request screen. The default sort order for the action log should be the most recent entry at the top.	High		
15.048	The system must provide the ability to print a hard copy of the action log related to a service request. The sort order must be in chronological order with the most recent entry appearing last.	High		
15.049	The system should provide a method to relate electronic documents and audio files to specific entries on the action log.	Medium		
15.050	The system should enable all the documents associated with the action log to be output to one continuous PDF file in chronological order from the earliest to the last document.	Medium		
15.051	The system must be configurable to automatically issue reminder tasks to Boards or Commissions based on action log entries and other events.	Medium		
15.052	Each entry on the action log must include a comments field which can be identified as not be available for public viewing.	High		
15.053	The system must track conditions imposed based on disciplinary actions on service requests and facilitate monitoring activities to insure that conditions are met including payment of fines, attendance at TIPs training, or other conditions.	High		
15.054	The system must issue an on screen prompt to the staff member after they complete the process of updating a service request to CLOSED status to also update the related license status. An efficient method to access the license and update its status and expiration date should be provided.	High		
15.055	Updating the service request status in the system to a status with related disciplinary action should automatically change the related license's, permit or property record status based on the disciplinary action codes.	Medium		
15.056	The staff member assigned to the issue and if submitted online the end customer must be notified by the system when the service request's status changes.	High		
15.057	The system should allow for the scheduling of hearings and Board/Department meetings.	Medium		
15.058	The system should provide an on-screen display of a list of conferences and hearings related to a service request which are scheduled in the future or held in the past.	Medium		
15.059	The system should be able to print a calendar of scheduled hearings and conferences related to service requests.	Medium		
15.060	The system should be able to integrate with MS Outlook to schedule conferences and hearings.	Medium		
15.061	The system should allow the staff member to select the duration, date, time and location for a meeting or hearing then system will show all available values from predetermined availability compatible to Outlook calendar.	Medium		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement -- Optional Additional Module Understanding**	**Priority**	**Response**	**Effort**
15.062	The system must be able to produce a report showing the number of Staff Assignments and service requests opened within a date range. The default date range should be the prior fiscal year. Staff Assignments and service requests must be counted separately. Each type must be counted by Department/Board, license type, and service request status.	High		
15.063	The system must be able to produce an aging report listing the OPEN Staff Assignments and service requests and indicating how long since their open date. Staff Assignments and service requests must be listed separately. The report data must group the issues by status and include the municipal staff and Boards or Commissions assigned to the issue.	High		
15.064	The system must be able to produce a report showing the number of service requests closed within a date range. service requests must be counted per Board/Department and license, permit, variance type and closure method.	Medium		
15.065	The system must be able to produce a report listing the service requests closed within a date range. The default date range is the prior work week.	Medium		
15.066	The system must be able to produce two reports, one showing the number of service requests and the other the number of Staff Assignments per municipal staff. Records to count must have been opened within a specified date range which defaults to the calendar year. service requests on the report are grouped and counted by service request status.	Medium		
15.067	The system must be able to produce a printed License Summary Sheet with all basic information about a license which is related to a service request. This sheet is suitable to place in the service request hard copy file.	High		
15.068	The system must be able to produce a detailed list of OPEN Staff Assignments & service requests by Board/Department code. The report should be able to be run for all Boards/Departments or for a selected Board/Department. This report must clearly indicate whether each issue is a service request or Staff Assignment, show the current status of the issue, and indicate the municipal staff assigned.	High		
15.069	The system must be able to produce a detailed list of OPEN Staff Assignments and service requests assigned to an municipal staff. The report should be able to be run for all municipal staff or produced for a selected municipal staff. The report should be able to be limited by Board/Department code.	High		
15.070	The system must be able to produce a list of service requests with decisions which have been appealed. The report must show the result of the appeal and the result date. The data to include on the report must be selectable and grouped by Board/Department.	High		
15.071	The system must be able to produce a list of the service requests that resulted in disciplinary action with a closed date within a specified date range. The data must be selectable and grouped by Board/Department.	High		
15.072	The system should have a mechanism to automatically notify enforcement staff (via e-mail or internal notation in workflow) who are assigned to an open service request, of any changes made to a licensees / respondent's record.	Medium		
15.073	The system must provide the ability for Staff to search for service requests by specifying various criteria including: 1. Board/Department 2. License / Permit / Variance Type 3. Service request number 4. License / Permit / Property ID number service request is associated with 5. Licensee or Individual name or Property service request is associated with 6. Requestors name 7. Key individual associated with a related license 8. Service request status 9. Opened between dates 10. Closed between dates 11. Final charges/ violations which were disposed 12. Decision codes 13. Service request Closure Method (e.g. Decision, Agreement, etc.)	Critical		

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			
Req #	**Requirement Statement -- Optional Additional Module Understanding**	**Priority**	**Response**	**Effort**
15.074	The system should support an online process which accepts requests for documents online by filling out a form and then subsequently allows an authenticated requestor to return to the request web page to view status updates, pay for the requested materials, and pick up electronic copies of documents.	Medium		
15.075	The system should be able to track the status of each public record request for documentation.	Medium		
15.076	The system should allow a multiple step workflow process to be configured for requests for public records which includes notifying staff members when files need to be pulled and when documents are ready to be reviewed.	Medium		
15.077	The system should be able to generate paper and/or email communications to the requestor regarding their request using templates which merge data from the request record.	Medium		
15.078	They system should allow request records to be linked to the licensee, license, permits and/or service request record that the request is about.	Medium		
15.079	The system should allow electronic documents to be attached to the request.	Medium		
15.080	The system should allow electronic documents attached to the request to be declared 'public' and therefore be available to the requestor via the request web page.	Medium		
15.081	The system should allow staff to assess a dollar amount the requestor must pay in order to receive the documents they requested.	Medium		
15.082	The system should allow payment for the assessed amount to be paid online or allow an over the counter check to be receipted.	Medium		
15.083	The system should be able to search for requests made by request number, requester name or the licensee, license, or service request the request is related to.	Medium		
15.084	The system must be able to produce a list of closed service requests that require ongoing monitoring with the data being selectable to report by Board/Department.	High		
15.085	The system should be able to generate a report on local activities for each license by municipality.	Medium		
15.086	The system should be able to generate a report on activities in the service request process for each license by municipality.	Medium		
Req #	**Bidder Comment / Note About Response Above**			

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages				
Req #	**Requirement Statement -- Optional Additional Module**	**Goals/Notes**	**Priority**	**Response**	**Effort**
16.001	Worker Order Processing - have the ability to convert Service Orders into Work Orders to have work performed -- assign human and equipment resources to be used to perform the completion of the work to allow for job costing.	Determining if a single system or a system that is integrated with an existing partner can handle the addition of a work order module in the future to supplement the optional Service Order Module described in the RFP.	Low		
16.002	Fixed Asset Data Collection, Tracking, Depreciation, Schedule and Unscheduled Maintenance, etc. GASB 34 reporting, preventative maintenance schedules / reminders optimize the life of assets, preventative maintenance as a loss control mechanism for Workers Compensation and Liability insurance loss prevention.	Determining if a single system or a system that is integrated with an existing partner can handle the addition an Asset Management system. The Service Order/Work Order system would potentially link to Municipal Employees, Municipal Assets to be repaired, improved or added. The cost of the work would be track and would either increase the value of the asset - capital improvement or would increase the expense associated with maintaining the asset allow.	Low		
Req #	**Vendor Comment / Note About Response Above**				

Bidder:	Type your Vendor / Company Name One on the Bidder Instruction Pages			

Permitting, Licensing and Inspection Bidder Requirements Response - Response Options

Business Requirements Response	RFP Language / Glossary	Description
CONFIGURABLE	Configurable	Requirement functionality is considered to be configurable if the process is driven by data stored in tables and it can be created and modified through a structured user interface by entering information to discrete fields and selecting options via radio buttons, check boxes, and drop down lists. Configurable also includes standard reports available through the system or readily built within the COTS system. Functionality is also considered to be configurable if code can be written, entered through a screen interface provided by the COTS software, and the code can be called or triggered by a configurable function within the software. This type of custom code would be stored and maintained as part of the overall configuration of the software.
TOOL	Tool Integration	Requirement functionality would be met by using an external tool which can be readily integrated with the COTS application via an exposed interface, or native database functionality such as triggers may be used to satisfy this requirement, or a report that would be built using a reporting tool outside the system but which references system data.
EXTERNAL	External Custom Code	In order to meet this requirement a pre or post process piece of custom code must be written and run outside the COTS software. Data required by the process is readily available through an exposed application programming interface and/or the output of the external process can be readily consumed by the COTS application. The custom code would be maintained & supported by the author or user of the code.
CORE	Core Change	In order to meet this requirement the COTS Software Publisher would develop or edit the proprietary COTS source software code within the COTS product to meet this functional requirement. The code would be maintained either as an integrated part of the core COTS application or as a known branch to the core application code.
NOT MET	Not Met	This requirement can not be met by the COTS application product.

Technical Requirements Response	RFQ Language / Glossary	Description
MET	Met / Meets	The software product as provided meets the requirement or installation can be configured in such a way as to meet the requirement. If there are multiple choices offered in the requirement or various ways the requirement can be met, please indicate in the comments which standard is adhered to or how the COTS product meets the requirement.
PARTIAL	Partially Meets	The software product partially meets this requirement. Specify in the comments column what part of this technical requirement is not met by the software product as provided.
CORE	Core Change	In order to meet this requirement the COTS Software Publisher would develop or edit the proprietary COTS source software code within the COTS product to meet this functional requirement. The code would be maintained either as an integrated part of the core COTS application or as a known branch to the core application code. If the core change is on a known technical development roadmap, state that in the comments, tell us the estimated timeline, and provide a copy of the technical development roadmap document if you have one.
NA	Not Applicable	The COTS product does not utilize this technology and therefore does not need to meet this standard. This choice is only acceptable where an "if" statement is included in the requirement.
UNKNOWN	Unknown	The bidder is unable to determine if the COTS product meets this requirement or not. Please state in the comments why you chose this response.
NOT MET	Not Met	This requirement is not be met by the COTS application product.

Permit, License and Inspection Bidder Requirements Response - Level of Effort	
EFFORT	**DESCRIPTION**
Small	A single resource could accomplish the customization work in a time period measured in days.
Medium	Multiple resources working together could accomplish the customization work in a period measured in weeks.
Large	A team of resources could accomplish the customization work in a period measured in months.