AnchorPoint
A Division of MTS

# Telecommunications Bill Management RFP
# Prepared for WVU

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**Contents**

## *PART 4 PROPOSAL FORMAT AND RESPONSE REQUIREMENTS*

### 4.1 Vendor's Proposal Format:

The proposal should be formatted in the same order, providing the information listed below:

**Title page** - Should state the RFP Subject and number, the name of the Vendor, Vendor's business address, telephone number, name of authorized contact person to speak on behalf of the Vendor, dated and signed.

**Table of Contents** - Clearly identify the material by section and page number.

**Section I** - Vendor should complete the technical proposal (Appendix A) for the Mandatory Requirements listed in specifications 3.1 through 3.5. Failure on the part of the vendor to meet the Mandatory Requirements removes the vendor from further consideration

**Section II** - The vendor will be evaluated on the information they provide in response to Sections 4.2.1 through 4.2.1.15.2. We ask that you read each specification carefully and respond with a detailed description or explanation.

**Section III** - Vendor should provide three (3) references as explained in Section 4.2.1.1 1.1.

**Section IV** - Vendor should provide the resumes of the vendor staff that will be committed to the State's implementation from Section 4.2.1.1 1.2.

**Section V** - Vendor should provide the signed Purchasing Affidavit (1.1 8) and disclosure of any subcontractors, Section 4.2.1.12.2.

**Section VI** - Vendor must provide the information requested in Section 4.5.1. NOTE: NO PRICING SHALL APPEAR IN THE BODY OF THE VENDOR'S RESPONSE TO THIS RFP. ALL PRICING MUST BE PRESENTED IN THE NOTED COST APPENDICES. If applicable, sign and submit the attached Resident Vendor Preference Certificate with the cost proposal.

## 4.2 Evaluation Process:

The following specifications will serve as the basis for the vendor's technical evaluation. The vendor's bid response should demonstrate their ability to meet the specification by providing a written description of the requested service with as much clear and succinct detailed information as possible. Since the vendor's detailed response will serve as the basis for the technical evaluation, it is not in the best interest of the vendors to respond with a simple "yes" or "no" response to these specifications.

## 4.2.1 Evaluation-Based Specifications

### 4.2.1.1 System Requirements

4.2.1.1.1 Please describe your methodology for handling multiple users accessing the same record concurrently. This should include but not be limited to: concurrent user limitations, impact on system degradation, etc. Please describe the systems ability to integrate with the existing Microsoft Active Directory LDAP for the purposes of user account creations and provisioning. For response purposes, assume 500 external users with an estimated 50 to 75 concurrent users.

There is virtually no limitation to the number of users accessing information simultaneously (other than licenses) via AnchorPoint's web-based modules. If selected the final solution provider, AnchorPoint will work with WVU to determine the appropriate number of users needed to access the TEM solution. This will help AnchorPoint size and build the solution with the right amount of power.

The AnchorPoint application uses Microsoft Windows Server 2003 Enterprise Active Directory and enhanced Microsoft SQL security features for user authentication purposes. This makes use of HTTPS and security certificates. In addition, the application has its own security that handles user authorization, or granting access to specific users based on their user account, user role, and customer business hierarchy.

In other words, a user accesses the AnchorPoint login page via a secure HTTPS connection and logs in. The Windows operating system authenticates users to ensure that users are who they claim to be, using Microsoft's Windows Server authentication algorithms. Once the user is authenticated, the AnchorPoint application grants that user access to the appropriate application functionality based on the user profile. For example, an admin role would have admin access while a telecom analyst responsible for Invoice Management might only have access to invoice management functionality. All these user roles and organization assignments are handled in the application security admin module and are customer accessible by the customer's admin role based users. AnchorPoint will work with WVU to set up the appropriate security levels based on user requirements during implementation.

All of the access to AnchorPoint is controlled via Active Directory. Within Active Directory, the password requirements are as strict as they can be.

Passwords must be at least 8 characters in length.

Passwords must contain at least three of the following: uppercase, lowercase, numbers, and symbols. Passwords cannot contain any part of the username.

AnchorPoint works with Active Directory and has single sign-on capabilities. AnchorPoint can use Active Directory to control user authentication and can be configured for additional integration to keep user data synchronized.

4.2.1.1.2 Please describe your backup and restore procedures.

Backup and Restore within a Licensed Environment

AnchorPoint does facilitate backup of the database without taking the server down. Nightly or even hourly backups of live data are possible. This is a standard feature of Microsoft SQL Server. Using the right recovery plan, data can be restored to any point in the past, in case of a disaster, or even an overzealous database maintainer.

Backup and Restore within a Managed Services Environment

The AnchorPoint databases are backed up nightly and the backups are stored off-site to prevent data loss in the event of failures. The backups of all application and commercial system software are maintained in multiple locations both on disk as well as tape media. Tapes are maintained in a secure offsite location.

In addition, the actual storage disks within the system are designed using the principles of a Redundant Array of Independent Disks (RAID). RAID technology was designed to acknowledge that disk drives generally have higher failure rates than other types of computer hardware due to their precision mechanics and compensate for disk loss via transparent data redundancy.

A RAID system appears to the infrastructure as a single disk drive with incredibly robust high availability characteristics when in fact it comprises a collection of drives that can fail and be replaced without data loss of service interruption. Variations of RAID technology are available and selected by AnchorPoint IT based on an analysis of usage patterns and performance considerations.

If or when disaster strikes, the primary objective of AnchorPoint is to restore application availability to its customers. If the probability of restoring the Production hosting site in a timely fashion is poor, an alternate site can be placed into service until such time as Production can be restored. This alternate site is referred to as the Disaster Recovery or DR site.

The following procedure defines the sequence of events and actions that occur in response to a disaster. The outcome of this procedure will be the appropriate response (e.g., failover to the DR site, restore of backup, etc.) to the initiating event.

4.2.1.1.3 Please provide hardware requirements for all components of your proposed system, including polling, reporting, transaction processing, and archiving.

For users of the database portion of the product, you need to install the system in a client server environment. However, users of the web-based parts of the solution do not need anything installed on their system other than a browser.

Minimum Technical Specifications for N-Tier Environment

AnchorPoint server software must be hosted on a Microsoft 2003 Server platform. AnchorPoint also utilizes the Microsoft SQL Server™ 2005 database – an ODBC compliant SQL database – which can run on the same hardware or on a separate Microsoft Windows Server.

The following provides AnchorPoint minimum Server configuration specifications. Although it is possible to use systems with less speed, memory, or 2-tier architecture; performance may be degraded.

Web Server

- Server class machine with Intel Pentium4 2.4 GHz or higher
- 2GB RAM
- Minimum of 70 GB disk space
- 1 Network Card configured to support TCP/IP
- MS Windows Server 2003 Enterprise
- Microsoft IIS 6.0

Application Server

- Server class machine with Xeon Processor 3.0 GHz or higher (Dual processor capability recommended)
- 4GB RAM
- Redundant Storage recommend (RAID1 or Raid 5 HD Array)
- Minimum of 100 GB disk space
- 1 Network Card configured to support TCP/IP
- 56K internal/external modem or equivalent (true modem, not winmodem) (For polling CDR Switch information)
- MS Windows Server 2003 Enterprise
- Apache 2.0 / Tomcat 4.1

Database Server

- Server class machine with Xeon Dual Processor 3.0 GHz or higher
- 4GB RAM
- Redundant Storage recommend (RAID1 or Raid 5 HD Array)
- Minimum of 100 GB disk space (See database sizing criteria for actual database storage sizing)
- 1 Network Card configured to support TCP/IP
- MS Windows Server 2003 Enterprise
- Microsoft SQL 2005 Server

Software Requirements

- Microsoft Windows Server 2003 Enterprise for all servers
- Microsoft Windows 2000 (SP4 or greater), or Windows XP (SP1 or greater) for all desktops
- Microsoft SQL Server 2005 for database server
- Microsoft IIS 6.0 for webserver
- Apache 2.0 / Tomcat 4.1 for application server

Disk and Database sizing is based on the following formula:

Application Server Storage

- 1GB per month per subscriber for reporting archive and call record archive

Database Server Storage

- 500MB per 100k assets
- per 1 million CDR records
- 1GB per 2 million Invoice line items (transactions)
- Storage requirements if processing CDR: 1GB per 1M rated calls, 500MB per 1M archived calls and 300 MB for reports

### 4.2.1.2 Sourcing Component

4.2.1.2.1 The system should be able to capture and/or retrieve call records from different PBX's and call accounting systems to facilitate the management of the services and serve as a data source for generating invoices and accommodate new switches and/or upgrades to VoIP systems. Please describe the methods offered by the vendor to accomplish this specification.

AnchorPoint Usage Management processes and reports on call records from multiple sources including PBX CDR, VoIP CDR, cell phones, calling cards, vendor long distance and 800 billing files and more. AnchorPoint uses Microsoft server, database and web interface technology, making its application easy to support and use.

Features and Benefits of Usage Management

- Handles single site and multi-site, to complex multiple-node networks—regardless of site configuration.
- Flexible costing options, including cost per minute, cost per call, pro-rated costing, ANI reporting and costing, and call digit translation both at the system and trunk group levels, ensure ultimate flexibility and accuracy.
- Extended Costing Features allow you to apply special charges and credits that are not commonly provided with Usage Management systems. These charges and credits can be one-time or recurring allocations.
- The Web Call Inquiry feature provides on-demand reporting of call detail or call summary information for selected extensions, telephone numbers, trunks, call types, etc. You can search against the current period's calls or archived call records from previous accounting periods. This feature is helpful to corporate managers for whom immediate communications information is important to their business operations.
- Expand your system to accept and process LD, 800, Cellular, Calling Card and other third party CDR from vendor sources. These import programs read the specific vendor data that is required for your company's application.
- Variety of reports for cost allocation, billing, network utilization and system administration for improved information access. Reports can be written to disk in PDF format to ease viewing and printing.

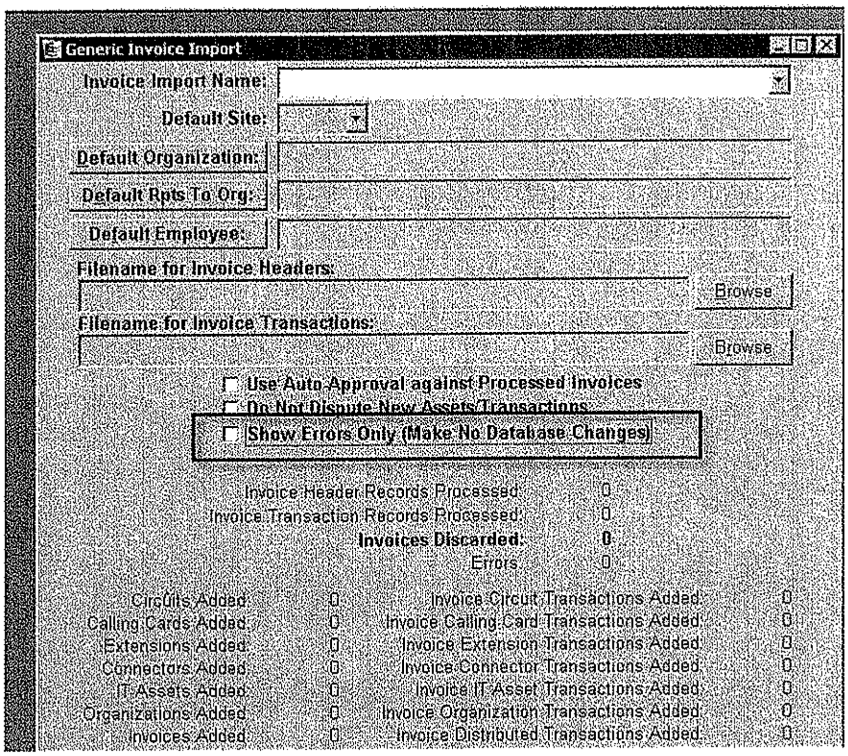
4.2.1.2.2 The Agency should have the capability to edit or delete billing information after it is entered into the database or imported from other resources. Please describe any limitations, if any, the vendor's system may have regarding this specification.

AnchorPoint complies by allowing the user to access data directly through maintenance screens. This change may be to one vendor associated with many accounts, or to an individual asset or invoice.

In addition to the direct manipulation of a record, AnchorPoint provides several global change utilities that allow the user to decide how associated database tables are to be updated. For example, if you change the accounting organization that is assigned to an employee, you are automatically given the opportunity to change the organization that is assigned to the Employee's assets. The utilities allow you to make mass updates, deletions and moves.

4.2.1.2.3 The system should allow the data to be run in "evaluation" mode based on Agency-defined parameters without committing records to the database.

AnchorPoint complies.




You are able to runthrough an invoice import process with the option "Show Errors Only" turned on. This will not make any changes to your data, but will show you errors that you can fix in advance.

Also with regards to the CDR, you can cost and re-cost the calling records as often as you choose until charges are allocated. Once something is allocated, it cannot be modified. However, if you want to experiment with different costing configurations, you can edit cost factors or per minute add-on rates or per minute replace rates to adjust rates. These changes will apply to the database, but can also be run against to return them to the prior state.

4.2.1.2.4 The vendor should describe the tariffs provided with the system and the method for updating same. These tariffs should be ones that would apply to the State of West Virginia. The system should have the ability to calculate tax by type of call and by type of account and accommodate multiple types of tariffs/taxes by call and/or account. The vendor should provide the name of the provider of the tariff changes. Any vendor eligible for an oral presentation will show the Agency how these tariffs are applied, blocked, etc. and how a complete listing can be obtained from their system.

AnchorPoint accommodates tariff management by entering them as rates in the contract rate screens. When there is a change to the rates, this is audited so that your team can examine the change before approval. If you do not want to audit at this level, you can simply audit against the previous month's bill. AnchorPoint highly recommends the use of contract rates for those customers interested in tracking tariffs.

4.2.1.2.5 Vendor files take on many different formats and arrive on many different media (please refer to Section 2.2 Current Environment). It is important to have a method for loading vendor information into the proposed system. The vendor should describe their ability for migrating the current vendor files into the system and describe the vendor's ability to migrate data when a new source data is required.

During the implementation period, AnchorPoint will work with WVU to learn how you manage inventory and invoices today and determine the best migration strategy for your situation. There are templates that allow bulk uploads from various templates, file exchanges to move data from a third party application to and from the AnchorPoint solution, as well as specific vendor import files that we use to get invoice data directly from the carrier.

Detail

AnchorPoint's flexible electronic invoice utilities facilitate the importing of invoice data from any number of electronic formats including but not limited to; CD, web downloads, excel spreadsheets, proprietary databases, XML files, or EDI. In fact the AnchorPoint utilities also facilitate the remapping of invoice fields should a vendor change their formats. The AnchorPoint platform can receive electronic data/files in many of the standard secure file formats such as secure FTP, HTTPS, SSL, IPSEC, etc.

If you choose the licensed solution, WVU can use the Generic CDR Import and Generic Invoice Import to import call records and invoices into AnchorPoint. You will have to provide the programs to convert the data from the vendor's format to the AnchorPoint standard formats. Or you can purchase programs from us to perform these activities.

For those invoices that are not available electronically, AnchorPoint offers an easy copy feature for ongoing manual entry, scanning services, or Managed Services for outsourcing this task as part of support to the organization.

### 4.2.1.3 Inventory Component

4.2.1.3.1 The vendor should describe the system's ability to track and inventory the state's telecommunications connectivity inventory items. These connectivity items were described under section 2.2 background.

AnchorPoint can house and track the voice and fax lines, BRIs, toll free lines, PRIs, DIDs and data circuits in our Circuit, Extension, Calling Card, Phone and IT Asset Management screens. The Inventory module of our product allows you to store as much detail as you need in the asset-specific screens. Each screen contains fields appropriate for storing the asset and even allows you to label user definable fields to meet any needs your asset tracking business rules require that we do not bring to you in the templated screens.

Once entered into the database application, your end users can use a variety of our asset reports to view and manage to the inventory in use, disconnected, in spare or ready to order.

When you are initially building your inventory, you will use standard load templates to bulk load your baseline. After that, the invoicing or call accounting processes will update and audit against the inventory so you can decide when to add or disconnect assets.

If you are interested in provisioning these assets from AnchorPoint, the Service Order module allows you to perform MACD and help desk type actions with realtime inventory updates.

Sample Inventory Reports

There are many reports related to assets and inventory that range from being able to track status, counts, or financial information.

## Spare Extension Report

| Site | Extension | Application Code | Organization | Spare Date | Pending W/O's |
|---|---|---|---|---|---|
| ATT | 3456723456 | | 5520H | | 0 |
| ATT | 6179023456 | | 2813224 | | 0 |
| CCI | 5089876485 | | 0000A1 | | 0 |
| CCI | 56238 | EXT | 5520H | | 0 |
| CCI | 6422506317 | IP Phone | 62991H | 5/28/2009 | 0 |
| CCI | 6428886565 | | 5520H | 4/28/2009 | 0 |

## Calling Card Report

| Employee Name | Site | Calling Card | Vendor | Organization |
|---|---|---|---|---|
| Williford, Elaine C | ATT | 7381533927 | | 47881H |
| Rose-Ward, Aisha | ATT | 7381654786 | | 6633771 |
| Adams, Chantel L. | ATT | 7381713853 | | 0292221 |
| Cortez, Laura M | ATT | 7430262549 | | 9733771 |
| Zamor-Estrella, Wanda | ATT | 7671488473 | | 4000S |
| Negussie, Richard | ATT | 7671688047 | | 52991H |
| James, Michael | ATT | 774-171-5696 | | 7620H |
| Quintanilla, Setu | ATT | 7741403902 | | 4000S |
| Abram, Nina | WIR | 1234567899 | | 0000A1 |

### 4.2.1.4 Cost Allocation

4.2.1.4.1 The system should allow for user-defined parameters for discarding unwanted calls or be able to recycle a rejected call until the system can match the call to the appropriate billing entity. The vendor should describe any limitations, processes, etc. associated with this specification.

AnchorPoint's Unallocated Calls report will show the calls that have not yet been assigned to an organization. You can decide whether to keep these or discard them. There are utilities that allow you to control how you want to handle this type of call.

4.2.1.4.2 The system should be capable of processing call records as soon as they are received from the polling devices and/or switches. This information should be immediately available to back office personnel as well as end users via the web-based system.

Our call accounting buffer device (Network or IP Call Guard) does collect real-time data and it is accessible and searchable at any time.

With AnchorPoint, you can accurately track usage of Centrex, PBX, and VoIP systems.

AnchorPoint's Call Guard call collection devices or IP Call Guard software are supplied and configured. Polling devices are connected to each PBX. AnchorPoint Call Guards give you control over your CDR. Call Guard is available as a standalone call collection device with data accessed remotely via a dial-up modem and as a network device – the Network Call Guard. The Network Call Guard device is connected to the switch's CDR port from which call records are automatically generated and collected. The Network Call Guard can store 6 million call records, and automatically retains calls for the last 60 calendar days – including the current day.

AnchorPoint's XP based Network Call Guard call collection device gives you complete control over your CDR. It provides redundant storage for call records, and on demand web-access to call detail. One call collection unit per switch site is proposed. The Network Call Guard unit is connected to the switch's CDR port.

The Network Call Guard is connected directly to your LAN/WAN just like any other workstation and accessed via a web browser. Users find that the Network Call Guard can be polled at speeds equivalent to their network speed–typically greater than 100,000 calls per minute. Network Call Guard is compatible with any LAN/WAN (Ethernet and Token Ring) that supports TCP/IP. In the event of a network outage, the direct connection to your switch ensures call records are not dropped.

In a multi-CDR source environment, VoIP traffic is defined as another CDR source and site within the AnchorPoint database. One VoIP database may include one site or multiple sites. If it includes multiple sites, then there must be information in the call records that will identify the originating site or all sites will be treated as one site in AnchorPoint. Call Accounting reports can be generated for the specific VoIP source. VoIP calls can be included in all network utilization and chargeback reports.

The AnchorPoint Poller is used to poll all AnchorPoint collection devices. With centralized polling, call records are brought into a single database for access by multiple users or for reporting purposes. You can provide personnel at remote locations with access to AnchorPoint. Through system security, you can control the information and system functions to which the remote users have access. The AnchorPoint Scheduler can be used to schedule the polling process.

4.2.1.4.3 The system should define local calling zones for multiple sites and customer groups. It should be capable of identifying changes in local calling areas relative to LEC's addition, elimination or changeover in area codes and exchanges.

During implementation, AnchorPoint works with the customer to set up all the local calling zones and sites. There is virtually no limit to the amount of local calling areas you can define per site per customer.

AnchorPoint provides Rate Tables that will provide vendor rates for the services used by WVU. WVU will be able to apply surcharges or discounts to these rates when allocating charges.

In addition, WVU will be able to modify rates that are defined in the AnchorPoint provided Rate Tables. WVU will also be able to define and maintain call rates through use of the AnchorPoint database.

Changes in the area code table are provided with the quarterly Rate and Location Table update. As new area codes are introduced, AnchorPoint defines these area codes in our Rate and Location Table generation system—generally we can define a new area code before it becomes active. Should a new area code become active before receipt of a quarterly Rate and Location Table, WVU will be able to modify the table to account for the new area code. At an additional cost, AnchorPoint can also provide updated Rate and Location Tables on a monthly basis if required.

4.2.1.4.4 The system should be able to charge back from multiple vendor services, including cellular, pager, blackberry, PDA, DSL, CATV, etc. Charges may also include roaming calls, service charges, and other fees. Please describe your systems capabilities for handling the services outlined in this specification.

AnchorPoint complies. AnchorPoint allows you to define categories that we call transaction types and application codes for all of the above. If an incoming charge matches this transaction type, it will be stored and audited at the line detail for the device you defined. You can set up chargeback and allocation by use of our standard utilities.

4.2.1.4.5 The Vendor should describe how their system handles the requirements for allocating costs as required in specification 3.2.3.3.

AnchorPoint cost allocation is by far one of the best in the market. Costs can be calculated based on rates, derived from the invoice, monthly fixed charge — or a combination of all three. Allocation can be to a cost center and/or an employee. Certain assets such as circuits and connectors can be associated to multiple cost centers and can be allocated by percentage or can be calculated based on usage. Transaction and call type charges can have set cost center or GL codes that would override ownership. Discounts, credits and other transactions can be allocated by percentage or usage. Allocation methods are determined during the design phase of your implementation and most allocation happens automatically via scheduled routines. However some allocation is performed by a user through our allocation tools, which provide selection criteria and run when executed.

With the AnchorPoint Usage Management Module you can cost, report, and bill for the following telecommunications services including switch calls, cellular calls, credit card usage, paging device usage, and other calls reported by a vendor. You can apply taxes to these calls. You can also apply an unlimited number of miscellaneous accounting Transactions to each accounting organization. The Organization Transactions can be recurring events or one-time only allocations. The allocated amounts can be credits or debits.

With the Usage Management module, you can apply and report on charges for the following types of CDR Usage (below). AnchorPoint provides tremendous flexibility in allowing you to customize the bills that you submit to your telecommunications user.

You can allocate charges for these types of calls:

| | | |
|---|---|---|
| Internal | Data | Cellular |
| Incoming | Credit Card | IntraLATA |
| Incoming 800 | Pager | InterLATA |
| DNIS | Centrex | IntraState |
| Service | Third Party | InterState |
| Collect | Tie Line | International |
| Information | Network | Local |

Database tools and wizard warnings ensure changes are made correctly and in consideration of all inventory associated with your hierarchy such as employees, assets, etc.

You define up to 15 Call Cost Groups. You define the Cost Groups, the Cost Group names, and the calls that should be reported in the each Cost Group. For each Cost Group, you determine if call detail records or just the summary information should be displayed in the reports. Summary information includes total number of calls, total minutes, and total call costs. You can also suppress all information for a Cost Group. If you are managing multiple switches, you can combine information from selected switches, or CDR sources, in the AnchorPoint reports. You can sort your telecommunications bill by employee, which is your customer, or by extension number.

#### 4.2.1.5 Invoice Management

4.2.1.5.1 The vendor should describe their system's ability to be able to process billing and/or print billing invoices without taking the system down or forcing users to exit the system.

There is no system downtime needed for the invoice import process. Also the ability to test the load before any changes are applied to the database, ensure that any time the database changes occur, they will be done without error because you will have fixed any issues in advance of the job. If you are worried about intense invoice import and audit, you can schedule it to run at times when few users are on the system (best practice). If you retain and attach scanned invoices, you can print billing invoices from a scan attached to the AnchorPoint invoice record at any time.

4.2.1.5.2 The Agency should have the capability to print or re-print customer bills on demand. For example, if an invoice has been lost and needs regenerated, the Agency needs to be able to reprint that invoice without impacting or disrupting previous updates (i.e. Accounts Receivable). In addition, if several invoices need reprinted at one time the Agency would like to have the capability to generate those invoices at one time instead of each invoice individually. The Vendor should describe their ability to meet this specification.

AnchorPoint complies with this request. Multiple users can print bills from their desktop. You can access the bills in the format you desire by printing the Invoice Detail or Invoice Summary bills. Depending on the parameters you include when running the report, you can restrict or allow as much information as needed. For instance you can print a bill for several cost centers at once, or just one. If you have followed the procedure for attaching invoice files to the AnchorPoint invoice, you can also open and reprint the original scan from our Invoice Maintenance screens.

4.2.1.5.3 The system should be capable of producing electronic and hardcopy invoices.

You can print the bills in a variety of electronic or printable formats including. PDF, CSV, XLS.

4.2.1.5.4 The vendor should describe their process for backing out an accounting feed, billing source information, invoices, etc. and note any scripts and or vendor intervention that may be required. This is essential for testing during implementation, and once the system is in use.

AnchorPoint implementation staff educates its customers on how to properly gather and populate information so that back outs are not an issue. During the invoice approval cycle there are several checkpoints for quality. This includes the ability to run an import in what we call "Show Errors Only," mode, where you can test your import without committing any changes to the database. Also, the load itself has a report that will tell you what it did if you needed to manually undo it. If an invoice has not been processes, it can be deleted...

However, were it necessary to back out a feed, it is an intricate process. Due to compliance issues, it is not allowable to modify a vouchered invoice once it reaches a final status without technical intervention.

4.2.1.5.5 The vendor should describe the process for pass-through charges for services and/or surcharges (flat rate or percentage) as part of the cost of a service or usage or as a line item to the invoice.

Our Generic Invoice Import process will collect and gather transaction types (USOC like line level detail) for each invoice. One time and recurring charges are stored in the appropriate fields on the asset level and can be summarized in invoice reports. To ensure that the pass through charges are found each time you run an invoice audit, you will have predefined a set of acceptable transaction types and a variance for how much they can be off. Anything that does not meet the appropriate requirements is kicked out to an exception list for your review. At that time you can validate the charges are appropriate or not. Some customers use a tool that allows them to always dispute charges that come through with a certain transaction type. This is a way to capture and analyze the 3rd party cramming and slamming in a proactive fashion.

AnchorPoint does provide a utility which allows our customers to mark-up charges (flat rate or percentage) for costs that need to be passed through to various departments, individuals and the like.

## 4.2.1.6 Dispute Management

4.2.1.6.1 The system should track all credits due from all vendors at any given point in time.

You can use the Dispute Management module to gather all outstanding disputes across vendors or by a specific vendor and by a type of dispute, such as credits. Currently this is done by creating a specific credit status and reporting in that fashion by that field. However, our roadmap has identified a package of dispute management reports for our next version.

4.2.1.6.2 The system should provide a means to track the lifecycle of invoice payments as well hold backs relative to disputed charges. The system should provide a means to incorporate correspondence directly into dispute transactions.

AnchorPoint complies. Within dispute management, you can enter comments as well as see the audit trail of status changes and when the status changed. Correspondence can be pasted into transaction records within the dispute system.

### 4.2.1.7 Reporting and Data Analysis

4.2.1.7.1 The system should allow for ad hoc reports and queries to interface with other applications such as spreadsheets, Access and electronic mail. The vendor should describe its exporting capabilities and limitations, if any.

AnchorPoint offers many standard reports to its various user audiences. You can also have certain reports distributed directly to the user base in email either embedded into the email body or as an attachment or both.

- AnchorPoint application menu reports allow you to save reports to: PDF, TXT files and in some cases, CSV files.
- SSRS-powered Operational and Drilldown reports allow you to save reports as: PDF, XML, CSV, TIFF, Web Archive, and Excel.
- Business Objects-powered Dashboard and Visibility reports allow you to save reports as Excel, CSV, and PDF.

Ad-hoc reports are also a component of the AnchorPoint system. See the attachment in question 4.2.1.7.2 for more information on our ad-hoc reporting options.

4.2.1.7.2 The system should have the capability to publish and automatically distribute standard reports, on-demand reports (adhoc), pre-scheduled reports (e.g., end-of-month), and customized reports as required for, based on security access levels. The vendor should provide a list, with descriptions, of all standard reports generated for each component. For ad-hoc and custom reports, the vendor should describe the reporting software used and provide examples.

AnchorPoint complies with this requirement. There is an attached file that explains the reporting solution. It is entitled AnchorPoint Sample Reporting Overview and will be printed and included in the response.

Please see the attachment in Appendix F: Sample Reporting Overview.

4.2.1.7.3 The system should be able to produce reports on all services related to a particular product and/or service address. These reports should be further defined to a specific vendor and/or customer.

Most of the standard reports allow you to further refine your results by one or more vendors or cost centers. You can produce reports on your assets, your services, and your billing. Service address is defined in our Locations screen, and locations are associated with assets. You can refine most of the reports to show you detail by location. If there is a particular combination that you are unable to find via one of the standard reports, you can simply create your own report that you can share with others in the organization.

4.2.1.7.4 The system should allow reporting tasks to be scheduled to run in unattended mode.

AnchorPoint complies.

4.2.1.7.5 The vendor should describe their ability to generate ad hoc reporting for traffic analysis. In addition, these reports should be capable of being exported into an ASCII format.

AnchorPoint comes with several traffic analysis and trunk reports; however, you can also create reports and dashboards in our Business Analytics module. Most AnchorPoint reports export into a CSV or PDF format.

4.2.1.7.6 The system should provide a means of generating reports to analyze provisioned services by being able to replace current pricing and/or services with Agency-defined data to determine the impact on the users. This analysis should also allow the tracking of usage and trending patterns to determine things such as contract compliance, minimum order guarantees, and usage variance over defined thresholds.

AnchorPoint has a Contract Expiration Report and a Vendor History Graph – that can be used to check your spend with vendors.

Also on the asset level you can do a little bit of what/if analysis.

Users of the integrated Service Order/Provisioning module in AnchorPoint can benefit from the proposed vs. current buttons. This functionality allows you to enter a change request to an existing asset and click the Proposed button to allow you to see the changes that will be made when the request has been closed. The proposed changes will appear as red text throughout the inventory screen tabs.

### 4.2.1.8 Ordering and Provisioning

4.2.1.8.1 The vendor should describe, in detail, their ordering and provisioning capabilities. This should include, but not be limited to: work order processes, required data to be captured and entered, security levels, tracking and reporting, trouble orders, what and how this component impacts other components of their system, browser-based, etc.

If you use the AnchorPoint Service Order Module to manage the MACD activity in your AnchorPoint solution, you can find the summary of this module in an attachment called, "Appendix G: AnchorPoint Service Order."

4.2.1.8.2 The vendor should describe the ability to have a "grocery" list of services that can be selected when ordering services. This should include, but not be limited to: cellular, calling card, rate plan, optional services, etc.

AnchorPoint complies. You can create a template for a set of services that you can copy and modify. The Work Order Project feature lets you manage a variety of MACD from one file. The individual statuses of each request can be tracked within the project, but you can also see a glance if the project itself is open or closed.

For example, a project may be defined and managed to add a new employee, add or activate an extension for the new employee, install a phone for the new employee, install a IT Asset for the new employee, assign a calling card, assign an authorization code, and provide the new employee with voice mail services. Seven work orders may be defined to provide the new employee with services. All seven work orders can be created under a common project. Another project example may be one of a grander scale. A department with a staff of 250 may be moving to a new location with phone configuration changes included. The project may involve at least 250 change or move work orders for the phones. These 250-plus work orders can be created under one project.

### 4.2.1.9 Installation, Implementation and Training

4.2.1.9.1 The vendor should describe the training that accompanies the procurement of each component and should include, but not be limited to: curriculum, number of students per class, manuals provided, and how training is accomplished for upgrades. 4.2.1.9.2 The vendor should provide an overview of the implementation approach, as well as methods used to track implementation milestones and facilitate internal reporting to upper management.

AnchorPoint offers training for both pre and post system implementation. They include:

AnchorPoint Training – Pre System Implementation

Training is provided as a component of the Project Implementation Plan that will be developed specific to WVU personnel will be provided onsite at the host location. Classes will be designed based on the knowledge requirements of the attendees to ensure effective utilization of class time and a complete understanding of the required information.

Training is performed in a classroom atmosphere, using live customer data. AnchorPoint will work with the customer to customize the training appropriate for various user groups and to schedule classes to minimize interference with regular work schedules.

AnchorPoint Training – Post System Implementation

AnchorPoint can provide refresher or training for new WVU employees on site at WVU at our standard per diem rate for training services, plus travel and living expenses.

The training will be provided as a "Train-the-Trainer" program and will be a hands-on training experience using the customer's actual system and data. Training will include up to 5 trainees maximum.

Audience Targeting (E.G. Administrator, User, Super-User, Technical)

The AnchorPoint Implementation Coordinator will work with you to identify how WVU staff will use AnchorPoint and who should be trained on specific AnchorPoint functions. The Training Agenda will be designed based on the knowledge requirements and business responsibilities of the attendees to ensure effective utilization of class time and a complete understanding of the required information.

Training attendees should have a basic knowledge of how their organization uses or plans to use the AnchorPoint software. Knowledge related to their own business responsibilities will help them to assimilate the information provided and to understand how to use AnchorPoint effectively to meet their organization's goals.

Training is provided as a component of the Project Implementation Plan that will be developed specific Hanover personnel will be provided on site at the host location. Classes will be designed based on knowledge requirements of the attendees to ensure effective utilization of class time and a complete understanding of the required information.

Training typically takes 1-3 days depending on the breath of the application being used.

4.2.1.9.3 The vendor should provide an overview of the escalation procedures and methods used to track the status of implementations.

Progress Coordination and Tracking

Following a kick-off meeting that will establish project management methodology, roles and responsibilities, communication plans, etc, a periodic meeting schedule will be followed to review ongoing progress against the project plan. Any key issues that arise that may impact accomplishing the plan will be discussed, documented and tracked until they are successfully resolved. Again, our Consulting Services Group and our Technology Center will support your AnchorPoint Project Manager throughout the implementation process.

Customer Acceptance

Following training and the assurance by the AnchorPoint Project Manager that WVU is satisfied and happy with the completed installation, we ask that our customers sign a Certificate of Completion to indicate that they have accepted – and are happy with – the installation.

4.2.1.9.4 The vendor should provide a detailed description of the implementation process being proposed. This description should include, but not be limited to: the resources provided by the vendor and the resources required of the customer.

AnchorPoint Team

AnchorPoint is dedicated to partnering with our clients to ensure a smooth installation for this project and promote ongoing customer satisfaction. AnchorPoint staff are trained on a regular basis on our applications, line of business specific skills, outsourcing capabilities, database administration, etc. Accordingly the following proposed account team structure will support WVU:

Executive Sponsor

- Overall visibility of project and escalation point
- Participates in scheduled Executive Bridging calls

Project Manager

- Overall responsibility of keeping project on track, securing appropriate resources, and keeping project team cohesive

Business Analyst / Consultant

- Representing end users
- Provides current process details and creates proposed process schematics
- Creates specs / use cases & performs testing
- Main project workhorse

SME

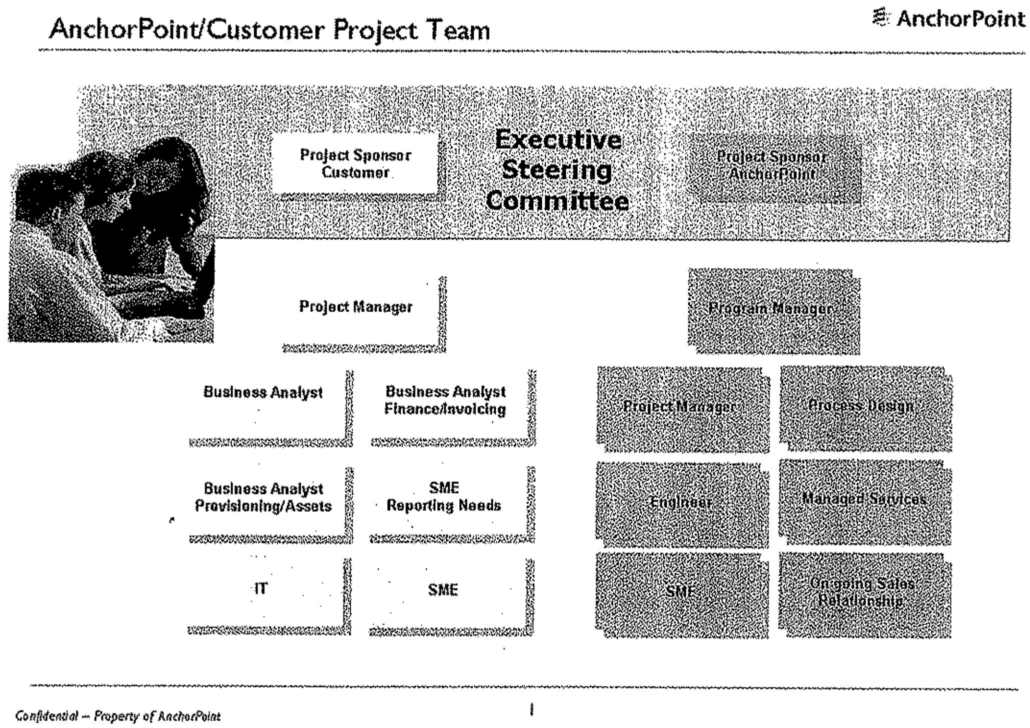
- Subject Matter Expert
- Provides details into specific functional areas (for example, invoice payment)

Engineers

- Develop interfaces, perform testing, etc.

IT

- Assist with connectivity issues
- Creating FTP directories, etc.




This is an example of the structure of a team for a Managed Services implantation.

Select Members may include:

**Rebecca Mitchell – Vice President, Solution Services**
Rebecca has overall responsibility for AnchorPoint's Managed Services, QA, Client Services and Development functions. She is a telecom veteran with over 20 years experience creating and developing telephony, call accounting and TEM software and solutions.

**Shaun Quarterman – Director of Managed Services**
Shaun has overall responsibility for the success AnchorPoint's hosting resources managed services.

Shaun is a seasoned telecom professional who has an extensive background in software and applications development. Shaun manages AnchorPoint's hosting environment including: systems management, dispute management, service levels and business continuity. In addition Shaun oversees the Managed Service engagements for our TEM customers.

**Lyn Hammond – Project Manager**

As Project Manager, Lynn has primary responsibility for working with clients on implementation, building customer databases, testing CDR import programs, testing custom import programs, and training.

Lyn has over six years of project management, software implementation and training experience. She brings with her several years of project management knowledge along with experience in business needs assessment and requirements management.

**Debra Crowell – Outsourcing Manager, Client Services**

Debra has overall responsibility for the success of this project and the coordination of AnchorPoint resources.

Debra will act as the Manager overseeing day-to-day operations of the relationship and maintaining the database. Debra will be the single point of contact after implementation to ensure on-time delivery, effective coordination and rapid resolution of database changes and reporting.

**Shauna Heydecker – Sales Manager**

Shauna is a strong customer advocate who owns the sales relationship and brings over 12 years of telecom communications sales experience to the project.

4.2.1.9.5 The vendor should provide a timeline for implementation along with projected milestones, deliverable dates and a sample implementation plan.

Please see the attached project plan in Appendix H, AnchorPoint Sample Implementation Plan. Implementation times vary depending on the final solution procured. The duration is contingent upon signed SOW and collection and validation of data.

4.2.1.9.6 The vendor should describe their procedure for data conversion of existing data into the proposed application. This description should include, but not be limited to, the type of data that can be converted, the resources required by the Agency, the resources provided by the vendor, and how mismatched data elements are handled.

The data is gathered from the customer, normalized and loaded into AnchorPoint's standard templates. The templates are in Excel format. The UAT environment is used to test the validity of the data and the load. Any exceptions are published into a list that the implementation team examines and fixes together.

4.2.1.9.7 Although not required if the vendor is proposing a vendor hosted implementation option they should describe the implementation process and benefits for the vendor hosted option.

AnchorPoint provides a licensed, hosted and managed service offering. The implementation steps are similar in that the customer works with AnchorPoint to validate that all the invoices, accounts and inventory are loaded into the system. Once this is done, if the customer chooses a hosted or managed services option, the customer will not be maintaining a server or working with imports. Instead they will manage their telecom spend by exception only.

This table shows the responsibilities and how they change in different options.

| TEM Function | License | Hosted | BPO / Managed Service |
|---|---|---|---|
| Technology Integration | C | A | A |
| System Management & Admin | C | A | A |
| Invoice Loading & Invoice Approval Paper vs. CD vs. Electronic | C | C | A / C |
| Auditing | C | C | A / C |
| Service Order Mgmt. | C | C | A / C |
| Asset Management (Contracts, Services & Inventory) | C | C | A / C |
| Payments | C | C | A / C |
| Dispute Management | C | C | A / C |
| Usage Management | C | C | A / C |
| Optimization | C | C | A / C |
| Business Analytics & Reporting | C | C | A / C |

C = Customer A = AnchorPoint

4.2.1.9.8 The vendor should describe and provide a Train-the-trainer program to the Agency staff. This program should enable the agency to train customers on the web-based applications as defined in Section 1.2. If this level of training is only provided off-site, the vendor's cost proposal must include the price of this training, including all travel, for at least five (5) Agency employees to attend.

There is also applicable information in the answer to question 4.2.1.9.1.

Training

Training is monitored as a component in the Project Implementation Plan and will be developed specific to your implementation requirements. All training for your personnel will be provided onsite at your location. Classes will be designed based on the knowledge requirements and the AnchorPoint related responsibilities of the attendees to ensure effective utilization of class time and a complete understanding of the required information.

Training is performed in a classroom atmosphere, using live customer data.

The cost of training is included in the AnchorPoint annual fees. The customer is responsible for travel and expenses as incurred.

AnchorPoint Training – System Implementation

Training is provided as a component of the Project Implementation Plan that will be developed specific to your implementation requirements. All training for customer personnel will be provided onsite at the host location. Classes will be designed based on the knowledge requirements of the attendees to ensure effective utilization of class time and a complete understanding of the required information.

Training is performed in a classroom atmosphere, using live customer data. AnchorPoint will work with the customer to customize the training appropriate for various user groups and to schedule classes to minimize interference with regular work schedules.

4.2.1.9.9 The vendor should provide additional training as needed after production implementation. The vendor should include any cost associated with this requirement in Appendix C - Other Costs.

NOTE: NO PRICING SHOULD APPEAR IN THE BODY OF THE VENDOR'S RESPONSE TO THIS RFP. ALL PRICING MUST BE PRESENTED IN THE NOTED COST APPENDICES.

AnchorPoint Training – Post System Implementation

AnchorPoint can also provide refresher or training for new employees at the customer site at our standard per diem rate for training services, plus travel and living expenses.

Audience Targeting (i.e. Administrator, User, Super-User, Technical)

The AnchorPoint Implementation Coordinator will work with you to identify how your staff will use AnchorPoint and who should be trained on specific AnchorPoint functions. The Training Agenda will be designed based on the knowledge requirements and business responsibilities of the attendees to ensure effective utilization of class time and a complete understanding of the required information.

### 4.2.1.10 Service and Support

4.2.1.1 0.1 The system should support on-line help per screen and should be modifiable by the Agency.

The solution does provide on-line help files. There is a detailed help file accessible from the horizontal menu. The help file covers every area of the product. The vertical menu consists of graphical icons that provide a shortcut into commonly used areas. It is also a location for icons to launch the full report solution. You cannot modify the help at this time; however, your feedback is always welcome by our Documentation team.

4.2.1.10.2 The vendor should describe the maintenance and support along with any warranty information covering each component of the system being proposed.

The AnchorPoint software license purchase price includes a 90 day warranty for any software and utilities beginning 30 days from shipment. Thereafter, current annual maintenance is 18% of the software, Interfaces, and utilities. Warranty and Maintenance includes help desk support and rights to new versions of licensed software.

The following describes the standard AnchorPoint warranty support and maintenance support services:

Application Software Support

Our help desk and client services personnel will assist Customer personnel who have questions about or have difficulties with AnchorPoint software. This includes problem diagnosis, analysis of abnormal results and resolution of operational problems. When necessary, AnchorPoint will provide software modifications.

AnchorPoint makes extensive use of remote maintenance procedures to reduce the problem determination time, as well as the time to resolve certain problems. Remote access has proven to be invaluable in supporting clients. AnchorPoint recommends the use of Remote Desktop via VPN. For security purposes, this access can be disabled when not needed for support.

If AnchorPoint determines that a problem is caused by something other than or exists in an area other than the AnchorPoint software application (such as the Customer's computer hardware or software), any support efforts (including the problem determination time) that AnchorPoint expends on the problem will not be covered as a part of the standard maintenance fee. This work would be billable at the then current rates, and requires written approval (email or FAX) and a purchase order in advance from the Customer. (See the Extended Support Services section).

Help Desk

AnchorPoint's normal Help Desk hours are Monday through Friday (excluding holidays), from 8:00 AM to 5:00 PM EST. The Help Desk can be reached via telephone, Email, or FAX. AnchorPoint will provide special quotes for extended Help Desk support upon request. If the Customer is not satisfied with the support provided by the Help Desk, the Customer or any Help Desk staff member may escalate the problem to the attention of the Client Services Manager.

Product Enhancements and Upgrades

Upgrades and enhancements made to AnchorPoint products are supplied to the Customer as they are made available. Standard upgrades are provided for software modules at no additional cost to those Customers who are under warranty or a current maintenance and support Agreement. These upgrades include software, installation instructions and documentation. From time to time, new functionality may be added and offered as a chargeable upgrade.

If a Customer so requests, AnchorPoint will provide onsite assistance, at a mutually agreeable time to implement enhancements and updates. This is an extended support service for which the Customer will be billed at AnchorPoint's then current support rates for onsite services.

Unauthorized Modifications

The AnchorPoint database is ODBC compliant and can be queried by a variety of software tools including Crystal Reports, Microsoft Access, etc. However, AnchorPoint strongly recommends that the data in the tables only be modified by AnchorPoint software, which provides the necessary editing to prevent the data from being corrupted. Any requests to examine or repair data corruption that results from "third party" (other than AnchorPoint) software programs, will be considered outside of our standard maintenance contract, and the warranty support and/or the maintenance and support provided for under this Agreement could be terminated.

If any software modules, database table definitions, stored procedures, or triggers are added or modified in any way without the written permission of AnchorPoint, the warranty support and/or the maintenance and support provided for under this Agreement could be terminated. In such an instance, AnchorPoint will have no responsibility to support the Customer for any functions related to the software modules, database, or to any programs that access the database.

Any support services resulting from the above, including the services used during the time needed to determine the origin of the problem, will be billable at the then current rates. In these instances, it may not be possible to provide the Customer with advance notice as to the billable nature of the services.

Custom Code or Vendor Imports

If any changes be required to Custom Code or Vendor Imports, for example, Vendor program format or fields change, to the program is billable and is not part of the annual maintenance.

Annual maintenance covers support and necessary changes in order for the program to work in future releases of AnchorPoint. If changes are required to custom code or vendor imports, we will provide you with a quote.

4.2.1.10.3 All calls for technical support via the toll-free number required in 3.2.7.1 should be answered by a live operator (no IVR or Automated Attendant) between the hours of 8AM and 8PM Eastern Standard Time.

AnchorPoint's normal Help Desk hours are Monday through Friday (excluding holidays), from 8:00 AM to 5:00 PM EST. The Help Desk can be reached via toll free telephone, Email, or FAX. AnchorPoint will provide special quotes for extended Help Desk support upon request. If the Customer is not satisfied with the support provided by the Help Desk, the Customer or any Help Desk staff member may escalate the problem to the attention of the Client Services Manager. Calls are answered by an Automated Attendant and users must select an option or the extension to get to the live person.

4.2.1.1 0.4 System documentation should be available on-line, preferably on the vendor's web site.

We provide the documentation on CDs when you purchase the product and when you are given upgrades.

4.2.1.10.5 System documentation should include database schema information.

AnchorPoint complies.

4.2.1.1 0.6 Please define the type of documentation and assistance provided by the vendor to complete upgrades.

AnchorPoint will perform your system upgrades for you. We provide both online and hard-copy documentation. The online help is an HTML Help file that contains the most complete information, while the manuals tend to focus on procedural items. The online help is available for every screen in AnchorPoint and cross references relevant topics. The help includes an index, search and table of contents. Updates to documentation are covered under standard warranty and maintenance agreements.

While there are other supporting materials that would be delivered depending on the package that WVU purchases, the baseline documentation set contains the following titles:

- User Guide
- Administrator Guide
- Online Help
- Reports Quick Reference (one for SSRS and one for Business Analytics)
- Interface Guide
- for upgraded customers, the latest New Features guide

### 4.2.1.11 Vendor Qualification

4.2.1.11.1 The vendor should provide at least three (3) customer references where a solution similar to the one in scope is being requested in this procurement document and has been successfully implemented in the last 24 months. At least, one (1) customer reference should be a govemmental environment. The annual telecommunications billing for these customer references should be at least $20,000,000 a year. References should describe, in detail, the type and duration of services, dates of service, and estimated annual billing. See Appendix E for the Customer

Reference Form. The Agency reserves the right to contact references, as well as develop its own references.

AnchorPoint complies. See Appendix E, Customer Reference

- State of Colorado
- Fairfax County, Virginia
- CH2M Hill

Please note: Often there is a significant time lag between our RFP response and when the prospective customer is prepared to call references. In order to insure a timely response to WVU's inquiry, we ask WVU to contact us when they are prepared to call the customers and we will inform the customer to expect the call.

4.2.1.11.2 The vendor should provide resumes, qualifications and past experience for all vendor staff committed to the State of WV project. The role of each staff member should also be identified.

AnchorPoint will provide the requested information if we are selected as the vendor of choice. At that time we will be able to assemble a team from our ready pool. However, the team will consist of the following roles:

Executive Sponsor

- Overall visibility of project and escalation point
- Participates in scheduled Executive Bridging calls

Project Manager

- Overall responsibility of keeping project on track, securing appropriate resources, and keeping project team cohesive

Business Analyst / Consultant

- Representing end users
- Provides current process details and creates proposed process schematics
- Creates specs / use cases & performs testing
- Main project workhorse

SME

- Subject Matter Expert
- Provides details into specific functional areas (for example, invoice payment)

Engineers

- Develop interfaces, perform testing, etc.

IT

Assist with connectivity issues

### 4.2.1.12 Project Management

4.2.1.12.1 The Vendor should disclose the planned use of any subcontractor(s). At a minimum, the following information should be provided for each subcontractor: the subcontractor's name and address and a brief description of the services they will be performing.

AnchorPoint does not anticipate using a subcontractor for this TEM initiative based on the requirements in this RFP.

4.2.1.12.2 If the Vendor's solution includes the use of subcontractors, two (2) separate customer references should also be provided for the subcontractor. See Appendix E for the Customer Reference Form. The Agency reserves the right to contact references, as well as develop its own references.

N/A

4.2.1.12.3 During the term of the contract, the Agency should be able to grant prior approval to any additions or changes to the named subcontractors even though the vendor awarded the contract will be responsible for all performance (or non-performance) of all subcontractors.

N/A

4.2.1.12.4 Each key member of the project management team should be dedicated to the project and not be assigned to any other projects without written approval of the State. The vendor should describe which member of the team for which they have provided resumes are considered "key" implementation team members.

AnchorPoint would discuss any conflicts or changes with WVU.

4.2.1.12.5 After the Project Manager is no longer required to be housed at or near the Agency's facility, the following should be provided for the life of the contract: The Project Manager should: serve as the single point of contact (SPOC) for all problem resolutions, billing issues, installation activity, etc.; be available to the state staff via a nationwide toll free calling service; and be responsible for ensuring appropriate vendor personnel are available to provide overall account management and meet with the Agency staff at their facility on a regularly scheduled basis which will be no less than once a month or as deemed necessary by the Agency.

AnchorPoint complies.

### 4.2.1.13 System Acceptance

4.2.1.13.1 The vendor should submit their standard of performance as part of the response to this proposal.

AnchorPoint's Professional Services Organization uses an internal quality control program that is modeled after the Project Management Institute's (PMI) PMBOK methodology, which is the ANSI standard for project management practices. This program ensures that all projects, education and support engagements follow a consistent and reproducible process. The PSO process is made up of several individual sub-processes that are woven together to create a seamless services and support organization. The processes are designed to create a replicable methodology of delivering "Best in Class" project management, contract programming, education, and support services.

### 4.2.1.14 Financial Activity

4.2.1.14.1 The system should maintain individual and group Accounts Receivable records on all customers. It should allow for aging and the automatic calculation of penalty charges on past due accounts. Vendor should explain how the system addresses this specification.

We come with the ability to set a credit limit on employees. Our system allows you post transactions on their extensions (payments). However, we do not keep a running balance or an aging and there are no automatic late charges.

4.2.1.14.2 The vendor should describe how its system allows payments to be posted in real-time and appropriately credit the customer's account. Vendor should describe how real-time posting is accomplished.

Payments - General Overview (Managed Services engagement)

1) Within Invoice Maintenance the Customer identifies the invoice charges for which payment is authorized. These charges are approved for payment. With this Voucher Generation option you select the invoices that are approved and assign these approved charges to a voucher.

2) Whenever an invoice transaction has been approved for payment, the invoice status may be updated to Voucher and a payment voucher generated for the approved transaction. The Invoice Approver updates the invoice status in Invoice Maintenance. Once the invoice is assigned the Voucher status, the Invoice Administrator may generate payment vouchers to authorize payment of the approved transactions.

3) In the case of our customers, each week we receive funds into our bank account on Saturdays from the respective customer. The approved voucher is send to A/P where a file is loaded into our Quickbooks account. A/P then cuts checks on Monday (generally) for the invoices needing payment. Checks are signed, stuffed and mailed to the vendors accordingly.

4) (This step is optional). Assuming Accounts Payable or Accounting provides check information for the paid invoices, you can post the Check Date, Check Number, and Check Amount in the Voucher Maintenance window. Voucher Maintenance is an option on the Maintenance > Invoice Management menu.

4.2.1.14.3 At the end of each billing, the system should create a file summarizing the financial activity for each accounting code/object code in the format specified by the Office of Technology. Vendor should describe how this process is accomplished.

AnchorPoint includes a standard GL Feed report that summarizes the activity for each charge code. If the standard GL Feed report does not meet your needs, it is possible to build your own report according to the internal specs in the ad hoc reporting system. Once built, you can run this each month.

4.2.1.14.4 The vendor should describe their system's ability to produce reports related to money collected in one fiscal year which was payment of services for a prior fiscal year. This should also include the details provided for the payment (i.e. date payment made, invoice being paid, amount, source ofpayment, etc.) 4.2.1.14.5 The vendor should describe their system's ability to produce reports for outstanding accounts receivables for both the current and prior fiscal year and the level of detail available.

There are financial detail and summary reports that let you report from the current year or any archived years.

4.2.1.14.6 The vendor should describe their system's ability to track the Agency's accounts payable by service, by vendor.

AnchorPoint has standard interface utilities for HR (employee information) systems, AP systems, and GL systems. If you purchase our AP utility, you will receive a standard AP Feed report that allows you to see information by vendor. This is available in Excel format as well, allowing you to group, search and sort the data.

4.2.1.14.7 The vendor should describe their system's ability to produce reports that show by customer account and/or by type of service, vendor or object code, the amount billed by service type, by vendor, the amount billed by the Office of Technology, any additional fees, etc.

There are many reports that allow you flexibility in how you filter and display your billing information. The most popular is the Chargeback Report, which lets you drill down through the organization structure to view the detail or summary of services and asset billing.

AnchorPoint

Page: 1 of 1

**Chargeback Report**

Period: 7/1/2008 - 7/30/2008

| Organization | Organization Name | Total Calls | Total Duration | Usage Charges | Equipment Charges | Recurring Charges | Other Charges & Credits | Total Charges |
|---|---|---|---|---|---|---|---|---|
| 3667 | Wilmington Trust Company | 457,028 | 17509:32:13 | 2,437.021 | 0.00 | 0.00 | 0.00 | 2,437.021 |
| 0101 | Wilmington Trust Company 0101 | 169,435 | 6387:10:32 | 1,330.627 | 0.00 | 0.00 | 0.00 | 1,330.627 |
| 4065 | Added by AnchorPoint | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 4970 | Added by AnchorPoint | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 9000 | Wilmington Trust | 287,593 | 11122:21:41 | 1,106.394 | 0.00 | 0.00 | 0.00 | 1,106.394 |
| Bellsouth Default | | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| Verizon Default | | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0000 | TCS Dept - T & E Approval | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0007 | TCS Dept - T&E Approval | 27,851 | 926:18:36 | 101.734 | 0.00 | 0.00 | 0.00 | 101.734 |
| 0111 | Wilmington Brokerage Service C | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0112 | Eliminations Subsidiary | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0119 | Drew VIII | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0120 | Drew I | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0121 | WT Corporation | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0135 | WT Investment Elim Sub | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0136 | Wilmington Trust UK LTD | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0138 | Wilmington Trust SP Services I | 0 | 00:00:00 | 0.000 | 0.00 | 0.00 | 0.00 | 0.000 |
| 0141 | Balentine Holding Inc. | 8,392 | 405:52:18 | 81.593 | 0.00 | 0.00 | 0.00 | 81.593 |
| 0400 | WTPA | 39 | 01:41:34 | 0.979 | 0.00 | 0.00 | 0.00 | 0.979 |
| 0800 | WTFSB | 82 | 12:02:06 | 5.224 | 0.00 | 0.00 | 0.00 | 5.224 |

# APPENDIX A- TECHNICAL PROPOSAL

(Specifcations 3.1 - 3.5)

| Section Reference | Vendor's Acknowledgement of Compliance |
|---|---|
| 3.1 General Requirements | **comply** |
| 3.2 Scope of Work | **N/A** |
| 3.2.1 Overall System Requirements | **N/A** |
| 3.2.1.1 | **comply** |
| 3.2.1.2 | **comply** |
| 3.2.1.3 | **comply** |
| 3.2.1.4 | **comply** |
| 3.2.1.5 | **comply** |
| 3.2.1.6 | **comply** |
| 3.2.1.7 | **comply** |
| 3.2.2 Sourcing Component Requirements | **N/A** |
| 3.2.2.1 | **comply** |
| 3.2.2.2 | **comply** |
| 3.2.3 Cost Allocation Component Requirements | **N/A** |
| 3.2.3.1 | **comply** |
| 3.2.3.2 | **comply** |
| 3.2.3.3 | **comply** |
| 3.2.4 Invoice Management Component Requirements | **N/A** |
| 3.2.4.1 | **comply** |
| 3.2.4.2 | **comply** |
| 3.2.5 Reporting and Data Analvsis Component Req. | **N/A** |

| | |
|---|---|
| 3.2.5.1 | **comply** |
| 3.2.6 Installation, Implementation & Training Com. Rq. | **N/A** |
| 3.2.6.1 | **comply** |
| 3.2.6.2 | **comply** |
| 3.2.7 Service and Support | **N/A** |
| 3.2.7.1 | **comply** |
| 3.2.7.2 | **comply** |
| 3.2.8 Vendor Qualifications | **N/A** |
| 3.2.8.1 | **comply** |
| 3.2.9 Proiect Management | **N/A** |
| 3.2.9.1 | **comply** |
| 3.2.9.2 | **comply** |
| 3.2.9.3 | **comply** |
| 3.2.10 System Acceptance | **N/A** |
| 3.2.10.1 | **comply** |
| 3.3 Special Terms and Conditions | **N/A** |
| 3.3.1 Insurance Requirements | **comply** |
| 3.3.2 License Requirements | **comply** |
| 3.4 Notice to Proceed | **comply** |
| 3.5 Renewals | **comply** |

**APPENDIX E – CUSTOMER REFERENCE**

**Customer Reference Information:**

Company Name: Fairfax County, VA

Type of Business: County Government

Describe the Type and Level of Services provided. Vendors are encouraged to describe these services in relation to the services being requested in this RFP. (Please attach additional pages as needed)

Call accounting, cost allocation, Invoice Management, Dispute Management, Reporting and Data Analysis, Ordering and Provisioning

Duration of Contracted Services:

Licensed Purchase

Dates of Services:

From Date: N/A To Date: N/A

Company's Estimated Annual Telecommunications Billing: Confidential

Purchase Order or Reference Number: Confidential

**Customer Contact Information:**

Name: Athena Baker

Title: Manager, Communication Svcs.

Address: 1200 Government Center Pkwy.
Suite 367

City: Fairfax State: VA

Telephone Number: 703-324-4562 Contact Number: 703-324-4562

## APPENDIX E – CUSTOMER REFERENCE

**Customer Reference Information:**

Company Name: CH2M Hill

Type of Business: Engineering, Construction + Operations

Describe the Type and Level of Services provided. Vendors are encouraged to describe these services in relation to the services being requested in this RFP. (Please attach additional pages as needed)

Call Accounting, Cost Allocation, Invoice Management, Dispute Management, Reporting and Data Analysis Ordering and Provisioning

Duration of Contracted Services:

36 Month Managed Services

Dates of Services:

From Date: N/A To Date: N/A

Company's Estimated Annual Telecommunications Billing: Confidential

Purchase Order or Reference Number: Confidential

**Customer Contact Information:**

Name: Adam Marsh

Title: Sr. Telecom Analyst

Address: 9191 S. Jamaica St.

City: Englewood State: CO

Telephone Number: 720-286-2390 Contact Number: 720-286-2390

## APPENDIX E – CUSTOMER REFERENCE

**Customer Reference Information:**

Company Name: State of Colorado

Type of Business: State Government

Describe the Type and Level of Services provided. Vendors are encouraged to describe these services in relation to the services being requested in this RFP. (Please attach additional pages as needed)

Call Accounting, Cost Allocation, Invoice Management Dispute Management, Reporting and Data Analysis, Ordering and Provisioning

Duration of Contracted Services:

36 month Managed Services

Dates of Services:

From Date: N/A To Date: N/A

Company's Estimated Annual Telecommunications Billing: Confidential

Purchase Order or Reference Number: Confidential

**Customer Contact Information:**

Name: Lorilie McCann

Title: Order Entry + Billing Manager

Address: 601 East 18th Avenue

Suite 250

City: Denver State: CO

Telephone Number: 303-764-7700 Contact Number: 303-764-7732

AnchorPoint

# Addendum F Sample Reporting Overview

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# Table of Contents

## AnchorPoint Management Reporting

AnchorPoint's consolidated communications intelligence database combined with our automated management reporting, web enabled report distribution, on demand queries, executive dashboards, user defined alarms and alerts, and a fully integrated an ad-hoc report writer enables end-users to provide management and telecom staff with the information they need, when they need it.

This summary is intended to provide the reader with a sampling of AnchorPoint reports. Actual reports may vary based on the final solution installed or procured.

## AnchorPoint Reporting Capabilities

AnchorPoint delivers numerous standard reports that allow you to extract the information that is required for financial, operational, and management responsibilities. The reports are standard, but they have been designed with input and for use by AnchorPoint's IT and telecommunication department customers.

The reporting features that AnchorPoint customer find beneficial including the following.

- AnchorPoint report output options include printer, screen, file, and email distribution of a report file.
- With AnchorPoint's Web Report Distribution feature, selected reports can be distributed via a corporate web site. AnchorPoint security allows you to control who has access to these web site reports.
- All reports can be scheduled for report generation and distribution to occur at a specified date and time and at recurring intervals.
- Selected reports can be parsed so that the recipient of the report only receives the section of the parsed report file that you have given them permission to access or to receive. For each recipient, you can define their areas of responsibilities in terms of organizations, employees, or extensions. The recipient only receives the information pertaining to their responsibilities. These parsed reports can be sent as an Adobe Acrobat PDF file attachment to an email message or can be accessed via your corporate web site.
- With the proposed Web Inquiry module, you can provide web site access to the Call Inquiry searches and reports, which provide on-demand reporting of call usage for the current accounting period or for past accounting periods.
- You control the number of accounting periods for which you want to retain archived data online. AnchorPoint has no limit to the number of accounting periods.
- Reports can be generated for a specific site – or for a combination of sites. You define the combination of sites using AnchorPoint's Report Groups functionality.
- Throughout the AnchorPoint system, we have provided numerous notepad fields for which the field label and application may be customized by the end-user. The standard AnchorPoint reports include the information that you store in the notepad fields and display your customized field labels.

- We have thoughtfully designed the reports with options to tailor report output through use of report selection criteria and sort options.

## Reporting Options

AnchorPoint Reporting provides many delivery options. Reports can be scheduled and delivered by email or made available on request on-line. Users can leverage out of the box graphical dashboards and our wide variety of reports, or they can create their own reports and dashboards. Formats include: Dashboards, PDF, Text, Crystal, Excel, HTML, etc.

With the Web Report Distribution, Web Inquiry, and Business Analytics functions, you can provide selected members of your corporate community with on-demand access to monthly detail and summary reports, exception reports, daily call information, and graphical reporting regarding trending and traffic statistics via a web site page. These features are helpful to corporate managers for whom immediate communications information is important to their business operations.

With well over 200 out of the box reports there are many reports unique to AnchorPoint. However, our strength lies in our ability to add criteria to every report and our ad hoc report option. Criteria can help view one of our reports by site, location, organization, employee, extension, etc. This gives each one of our many reports extended power.

For ad hoc, graphical, and executive dashboard reporting AnchorPoint provides Business Analytics. This provides users with out of the box graphical reports plus full access to our database and a drag and drop tool for creation of tabular and or graphical reports with drill down and sort capabilities. Created reports can be saved to the corporate or private portfolios, distributed or provided on dashboards.

## AnchorPoint Business Analytics

AnchorPoint Business Analytics leverages industry leading reporting tools to provide an innovative, flexible, and integrated business intelligence solution for telecommunications. By providing stakeholders with a view of communications lifecycle via a dashboard containing alerts, scorecards, analytics, and reports, users can monitor key business metrics, analyze performance issues, and set goals to get their operations back on track. This module also provides users a powerful, yet intuitive ad-hoc reporting tool to uniquely examine their communications environment and then sort, graph and publish the results.

Dashboard tools provide:

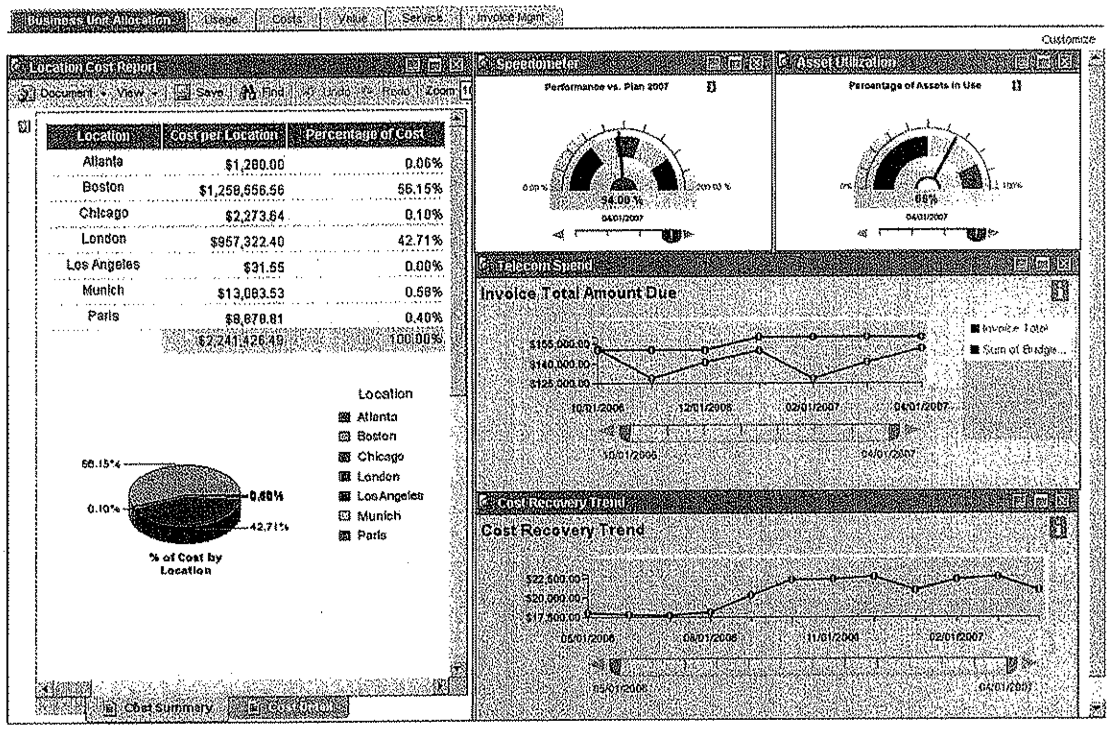
- Central repository with quick access to relevant information for C-level through operations level
- Graphical trend analysis through multiple methods
- Customization for individual users
  - Benchmarking tools to monitor internal performance
  - Compare one location to another
- Compare current month to previous month or previous year
- Pre-built KPIs (Key Performance Indicators) including:
  - Spend vs. Budget
  - Expenses by Type
  - Expenses by Site
  - Asset Utilization

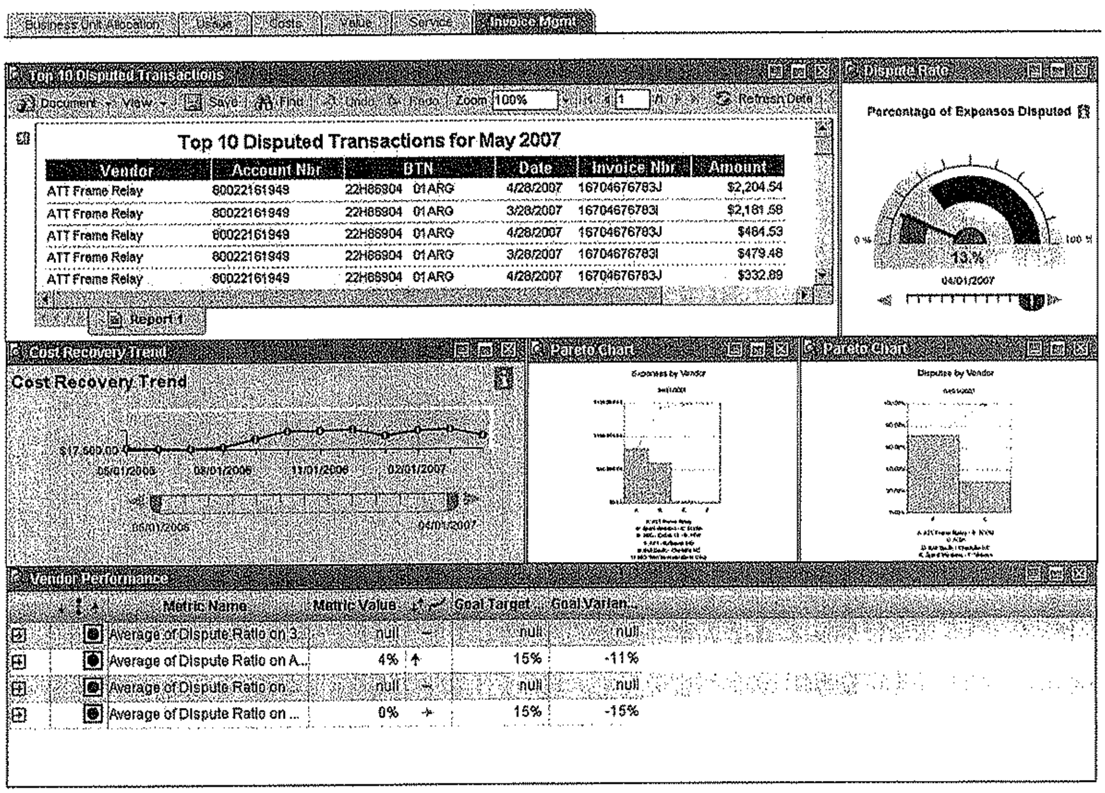
Ad-hoc reporting tools provide:

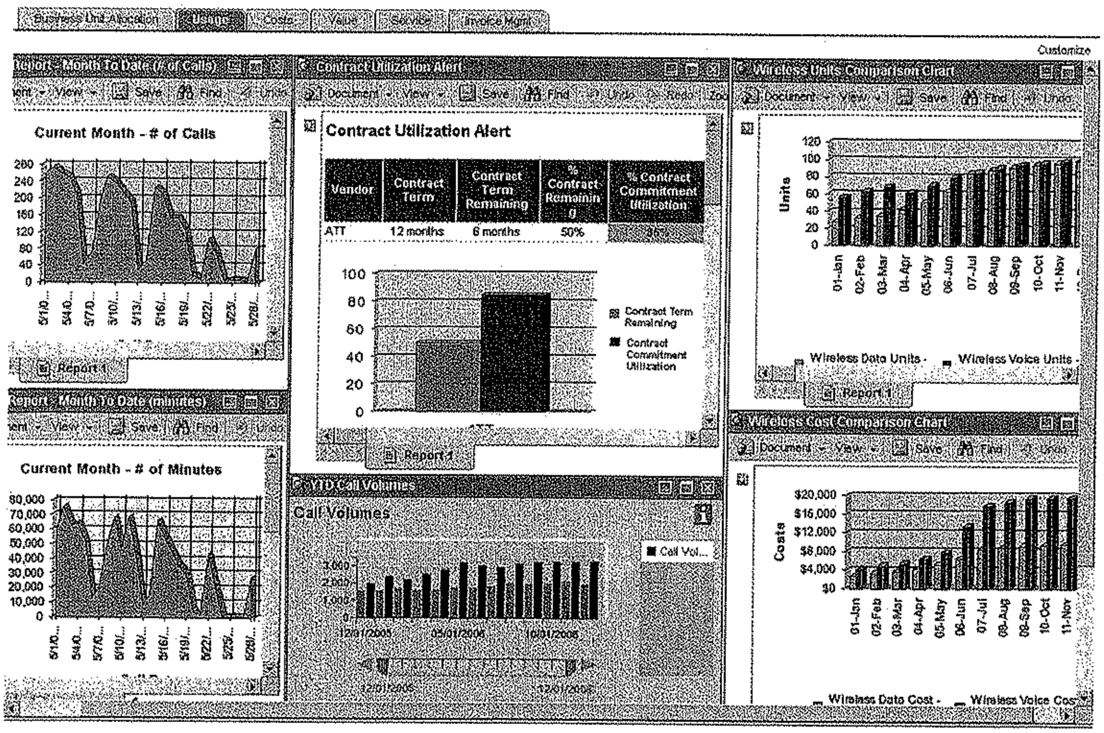
- User-friendly database representation
- A best-in-class user interface that allows anyone to be a report creator

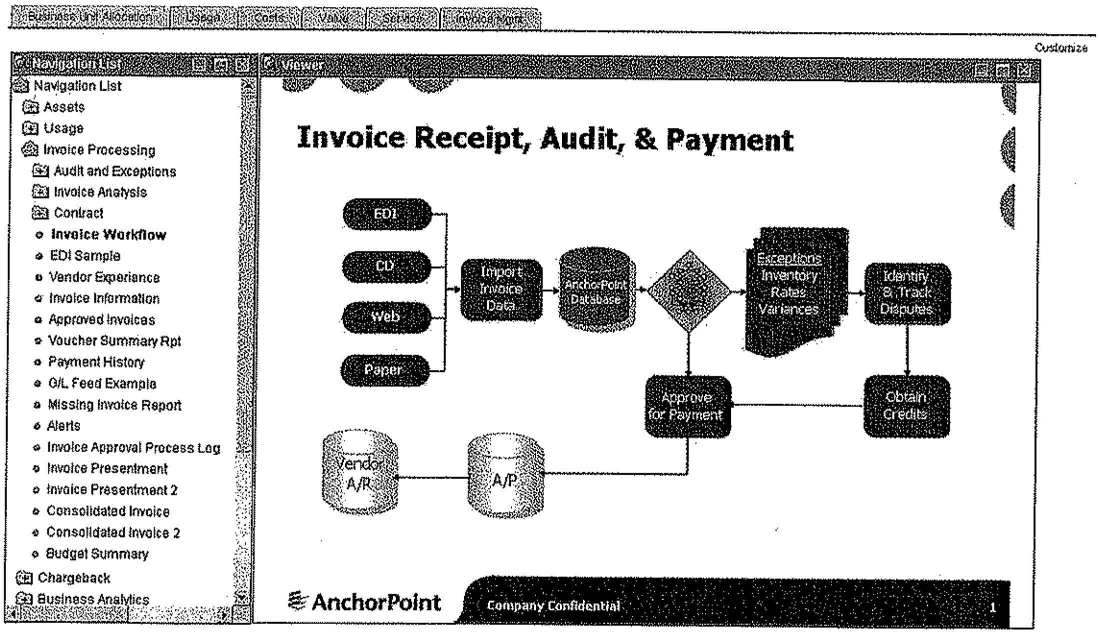
**The following pages include sample reports & sample dashboards for illustrative purposes.**

**NOTE: Not all dashboards are standard—must be created by end-users.**


Business Unit Allocation
Usage
Costs
Value
Service
Invoice Mgmt
Customize
Location Cost Report
Location
Cost per Location
Percentage of Cost
Atlanta $1,280.00 0.06%
Boston $1,258,556.56 56.15%
Chicago $2,273.64 0.10%
London $957,322.40 42.71%
Los Angeles $31.55 0.00%
Munich $13,083.53 0.58%
Paris $8,878.81 0.40%
$2,241,426.49 100.00%
Location
Atlanta
Boston
Chicago
London
Los Angeles
Munich
Paris
% of Cost by Location
Cost Summary
Speedometer
Performance vs. Plan 2007
94.00 %
Asset Utilization
Percentage of Assets in Use
69%
Telecom Spend
Invoice Total Amount Due
Invoice Total
Sum of Bridge...
Cost Recovery Trend
Cost Recovery Trend


Business Unit Allocation
Usage
Costs
Value
Service
Invoice Mgmt
Top 10 Disputed Transactions
Top 10 Disputed Transactions for May 2007
Vendor
Account Nbr
BTN
Date
Invoice Nbr
Amount
ATT Frame Relay 80022161949 22H86904 01ARG 4/28/2007 16704676783J $2,204.54
ATT Frame Relay 80022161949 22H86904 01ARG 3/28/2007 16704676783I $2,161.58
ATT Frame Relay 80022161949 22H86904 01ARG 4/28/2007 16704676783J $464.53
ATT Frame Relay 80022161949 22H86904 01ARG 3/28/2007 16704676783I $479.48
ATT Frame Relay 80022161949 22H86904 01ARG 4/28/2007 16704676783J $332.89
Report 1
Dispute Rate
Percentage of Expenses Disputed
13 %
Cost Recovery Trend
Cost Recovery Trend
Pareto Chart
Expenses by Vendor
Pareto Chart
Disputes by Vendor
Vendor Performance
Metric Name
Metric Value
Goal Target
Goal Varian...
Average of Dispute Ratio on 3... null null null
Average of Dispute Ratio on A... 4% 15% -11%
Average of Dispute Ratio on ... null null null
Average of Dispute Ratio on ... 0% 15% -15%


Contract Utilization Alert
Current Month - # of Calls
Current Month - # of Minutes
Call Volumes
Wireless Units Comparison Chart
Wireless Cost Comparison Chart


Navigation List
Assets
Usage
Invoice Processing
Audit and Exceptions
Invoice Analysis
Contract
Invoice Workflow
EDI Sample
Vendor Experiance
Invoice Information
Approved Invoices
Voucher Summary Rpt
Payment History
G/L Feed Example
Missing Invoice Report
Alerts
Invoice Approval Process Log
Invoice Presentment
Invoice Presentment 2
Consolidated Invoice
Consolidated Invoice 2
Budget Summary
Chargeback
Business Analytics
Invoice Receipt, Audit, & Payment
EDI
CD
Web
Paper
Import Invoice Data
AnchorPoint Database
Exceptions Inventory Rates Variances
Identify & Track Disputes
Approve for Payment
Obtain Credits
Vendor A/R
A/P
AnchorPoint
Company Confidential

AnchorPoint

Invoices to Review (with Status = Final Approval)

AnchorPoint

**3COM** — $2,214.18

| Invoice Nbr | Trans Amount | Account Nbr | BTN | Invoice Date | Due Date | Amount Remaining |
|---|---|---|---|---|---|---|
| 88090023 | $2,214.18 | 1 | 1 | 8/1/06 | 9/15/06 | $0.00 |

**ATT Frame Relay** — $73,796.77

| Invoice Nbr | Trans Amount | Account Nbr | BTN | Invoice Date | Due Date | Amount Remaining |
|---|---|---|---|---|---|---|
| 16704676741 | $61,932.77 | 80022161931 | 22H86904 01All | 8/7/06 | 9/26/06 | $0.00 |
| 16704676783J | $11,864.00 | 80022161949 | 22H86904 01ARG | 8/7/06 | 9/26/06 | $3,931.92 |

**Bell South - Charlotte NC** — $1,084.30

| Invoice Nbr | Trans Amount | Account Nbr | BTN | Invoice Date | Due Date | Amount Remaining |
|---|---|---|---|---|---|---|
| 01042004 | $166.38 | 561 283-1546 001 | 561-283-1546 | 10/4/05 | 10/23/05 | $0.00 |
| 02042004 | $154.53 | 561 283-1546 001 | 561-283-1546 | 11/4/05 | 11/23/05 | $0.00 |
| 03042004 | $142.68 | 561 283-1546 001 | 561-283-1546 | 12/4/05 | 12/23/05 | $0.00 |
| 03132004 | $209.57 | 678 427-0880 | | 12/13/05 | 1/12/06 | $0.00 |
| 04132004 | $205.57 | 678 427-0880 | | 1/13/06 | 2/12/06 | $0.00 |
| 05132004 | $205.57 | 678 427-0880 | | 2/13/06 | 3/12/06 | $0.00 |

# Voucher Summary Report

AnchorPoint

## ATT - Baltimore MD $3,167.44

| Voucher ID | Voucher Date | Account Nbr | Amount to Pay |
|---|---|---|---|
| 200703150001 | 6/15/07 | EVHUS4H-909481 | $1,571.22 |
| 200703300001 | 6/30/07 | EVHUS4H-909481 | $1,596.22 |

## ATT Frame Relay $1,248,550.57

| Voucher ID | Voucher Date | Account Nbr | Amount to Pay |
|---|---|---|---|
| 200410200001 | 5/20/07 | 80022161931 | $2,028.11 |
| 200410200002 | 5/20/07 | 80022161931 | $1,761.70 |
| 200410200003 | 5/20/07 | 80022161931 | $2,621.62 |
| 200410200004 | 5/20/07 | 80022161931 | $2,315.95 |
| 200410200005 | 5/20/07 | 80022161931 | $2,399.50 |
| 200410200006 | 5/20/07 | 80022161931 | $779.99 |
| 200410200007 | 5/20/07 | 80022161931 | $2,179.97 |
| 200410200008 | 5/20/07 | 80022161931 | $282.36 |
| 200410200009 | 5/20/07 | 80022161931 | $1,907.21 |
| 200410200010 | 5/20/07 | 80022161931 | $2,336.21 |
| 200410200011 | 5/20/07 | 80022161931 | $540.21 |
| 200410200012 | 5/20/07 | 80022161931 | $1,864.39 |
| 200410200013 | 5/20/07 | 80022161931 | $2,010.94 |
| 200410200014 | 5/20/07 | 80022161931 | $2,261.17 |
| 200410200015 | 5/20/07 | 80022161931 | $304.86 |
| 200410200016 | 5/20/07 | 80022161931 | $1,658.50 |
| 200410200017 | 5/20/07 | 80022161931 | $3,020.24 |
| 200410200018 | 5/20/07 | 80022161931 | $1,907.21 |
| 200410200019 | 5/20/07 | 80022161931 | $2,386.85 |
| 200410200020 | 5/20/07 | 80022161931 | $3,236.34 |
| 200410200021 | 5/20/07 | 80022161931 | $2,329.87 |
| 200410200022 | 5/20/07 | 80022161931 | $2,268.76 |
| 200410200023 | 5/20/07 | 80022161931 | $1,891.03 |
| 200410200024 | 5/20/07 | 80022161931 | $2,261.17 |
| 200410200025 | 5/20/07 | 80022161931 | $2,706.80 |
| 200410200026 | 5/20/07 | 80022161931 | $2,341.95 |
| 200410200027 | 5/20/07 | 80022161931 | $674.23 |
| 200410200028 | 5/20/07 | 80022161949 | $367.24 |
| 200410200029 | 5/20/07 | 80022161949 | $142.17 |
| 200410200030 | 5/20/07 | 80022161949 | $387.07 |
| 200410200031 | 5/20/07 | 80022161949 | $1,908.86 |
| 200410200032 | 5/20/07 | 80022161949 | $397.51 |
| 200410200033 | 5/20/07 | 80022161949 | $1,091.53 |
| 200410200034 | 5/20/07 | 80022161949 | $603.38 |
| 200410200035 | 5/20/07 | 80022161949 | $411.44 |
| 200410200036 | 5/20/07 | 80022161949 | $768.20 |
| 200410200037 | 5/20/07 | 80022161949 | $559.22 |
| 200410200038 | 5/20/07 | 80022161949 | $528.77 |

## Payment History

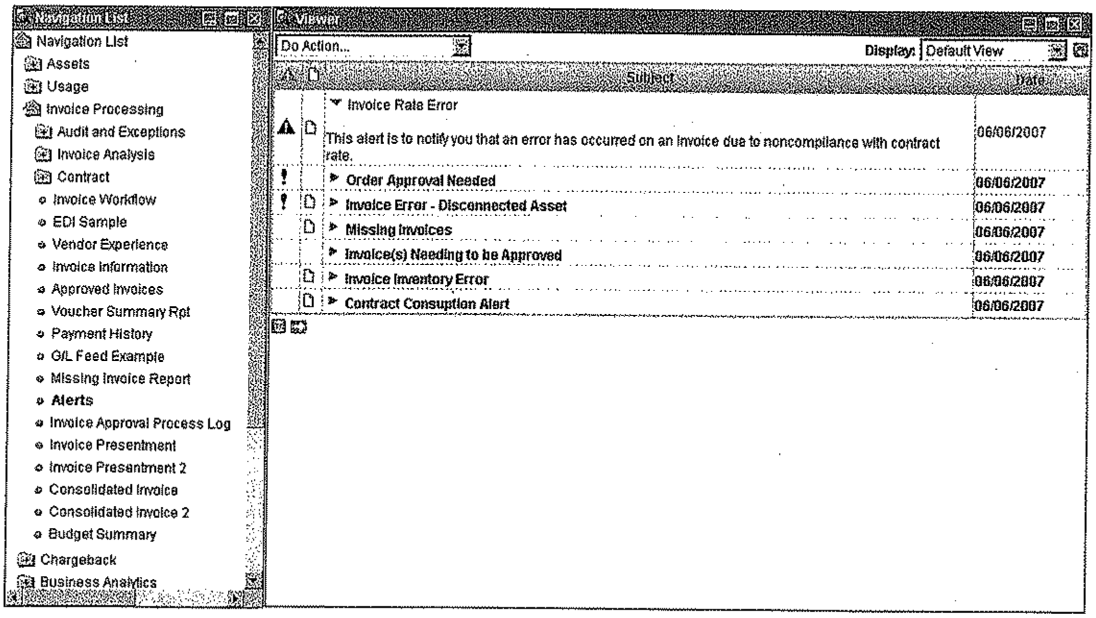
AnchorPoint

### ATT - Baltimore MD — $3,167.44

| Voucher ID | Voucher Date | Check Nbr | Check Date | Amount to Pay | Check Amount |
|---|---|---|---|---|---|
| 200703150001 | 5/16/07 | 980129 | 6/20/07 | $1,571.22 | $1,571.22 |
| 200703300001 | 5/31/07 | 980130 | 6/20/07 | $1,596.22 | $1,596.22 |

### ATT Frame Relay — $1,248,550.57

| Voucher ID | Voucher Date | Check Nbr | Check Date | Amount to Pay | Check Amount |
|---|---|---|---|---|---|
| 200410200001 | 4/20/07 | 9327459801 | 5/23/07 | $2,028.11 | $2,028.11 |
| 200410200002 | 4/20/07 | 9327459802 | 5/23/07 | $1,761.70 | $1,761.70 |
| 200410200003 | 4/20/07 | 9327459803 | 5/23/07 | $2,621.62 | $2,621.62 |
| 200410200004 | 4/20/07 | 9327459804 | 5/23/07 | $2,315.95 | $2,315.95 |
| 200410200005 | 4/20/07 | 9327449805 | 5/23/07 | $2,399.50 | $2,399.50 |
| 200410200006 | 4/20/07 | 9327459806 | 5/23/07 | $779.99 | $779.99 |
| 200410200007 | 4/20/07 | 9327459807 | 5/23/07 | $2,179.97 | $2,179.97 |
| 200410200008 | 4/20/07 | 9327459808 | 5/23/07 | $282.36 | $282.36 |
| 200410200009 | 4/20/07 | 9327459809 | 5/23/07 | $1,907.21 | $1,907.21 |
| 200410200010 | 4/20/07 | 9327459810 | 5/23/07 | $2,336.21 | $2,336.21 |
| 200410200011 | 4/20/07 | 9327459811 | 5/23/07 | $540.21 | $540.21 |
| 200410200012 | 4/20/07 | 9327459812 | 5/23/07 | $1,864.39 | $1,864.39 |
| 200410200013 | 4/20/07 | 9327459813 | 5/23/07 | $2,010.94 | $2,010.94 |
| 200410200014 | 4/20/07 | 9327459814 | 5/23/07 | $2,261.17 | $2,261.17 |
| 200410200015 | 4/20/07 | 9327459815 | 5/23/07 | $304.86 | $304.86 |
| 200410200016 | 4/20/07 | 9327459816 | 5/23/07 | $1,658.50 | $1,658.50 |
| 200410200017 | 4/20/07 | 9327459817 | 5/23/07 | $3,020.24 | $3,020.24 |
| 200410200018 | 4/20/07 | 9327459818 | 5/23/07 | $1,907.21 | $1,907.21 |
| 200410200019 | 4/20/07 | 9327459819 | 5/23/07 | $2,386.85 | $2,386.85 |
| 200410200020 | 4/20/07 | 9327459820 | 5/23/07 | $3,236.34 | $3,236.34 |
| 200410200021 | 4/20/07 | 9327459821 | 5/23/07 | $2,329.87 | $2,329.87 |
| 200410200022 | 4/20/07 | 9327459822 | 5/23/07 | $2,268.76 | $2,268.76 |
| 200410200023 | 4/20/07 | 9327459823 | 5/23/07 | $1,891.03 | $1,891.03 |
| 200410200024 | 4/20/07 | 9327459824 | 5/23/07 | $2,261.17 | $2,261.17 |
| 200410200025 | 4/20/07 | 9327459825 | 5/23/07 | $2,706.80 | $2,706.80 |
| 200410200026 | 4/20/07 | 9327459826 | 5/23/07 | $2,341.95 | $2,341.95 |
| 200410200027 | 4/20/07 | 9327459827 | 5/23/07 | $674.23 | $674.23 |
| 200410200028 | 4/20/07 | 9327459828 | 5/23/07 | $367.24 | $367.24 |
| 200410200029 | 4/20/07 | 9327459829 | 5/23/07 | $142.17 | $142.17 |
| 200410200030 | 4/20/07 | 9327459830 | 5/23/07 | $387.07 | $387.07 |
| 200410200031 | 4/20/07 | 9327459831 | 5/23/07 | $1,908.86 | $1,908.86 |
| 200410200032 | 4/20/07 | 9327459832 | 5/23/07 | $397.51 | $397.51 |
| 200410200033 | 4/20/07 | 9327459833 | 5/23/07 | $1,091.53 | $1,091.53 |
| 200410200034 | 4/20/07 | 9327459834 | 5/23/07 | $603.38 | $603.38 |
| 200410200035 | 4/20/07 | 9327459835 | 5/23/07 | $411.44 | $411.44 |
| 200410200036 | 4/20/07 | 9327459836 | 5/23/07 | $768.20 | $768.20 |
| 200410200037 | 4/20/07 | 9327459837 | 5/23/07 | $559.22 | $559.22 |
| 200410200038 | 4/20/07 | 9327459838 | 5/23/07 | $528.77 | $528.77 |
| 200410200039 | 4/20/07 | 9327459839 | 5/23/07 | $520.65 | $520.65 |
| 200410200040 | 4/20/07 | 9327459840 | 5/23/07 | $590.49 | $590.49 |
| 200410200041 | 4/20/07 | 9327459841 | 5/23/07 | $1,771.64 | $1,771.64 |


Navigation List
Viewer
Navigation List
Assets
Usage
Invoice Processing
Audit and Exceptions
Invoice Analysis
Contract
Invoice Workflow
EDI Sample
Vendor Experience
Invoice Information
Approved Invoices
Voucher Summary Rpt
Payment History
G/L Feed Example
Missing Invoice Report
Alerts
Invoice Approval Process Log
Invoice Presentment
Invoice Presentment 2
Consolidated Invoice
Consolidated Invoice 2
Budget Summary
Chargeback
Business Analytics
Do Action...
Display: Default View
Subject
Date
Invoice Rate Error
This alert is to notify you that an error has occurred on an invoice due to noncompliance with contract rate.
06/06/2007
Order Approval Needed
06/06/2007
Invoice Error - Disconnected Asset
06/06/2007
Missing Invoices
06/06/2007
Invoice(s) Needing to be Approved
06/06/2007
Invoice Inventory Error
06/06/2007
Contract Consuption Alert
06/06/2007

## Contract Expiration Report

AnchorPoint

### ATT - Baltimore MD

| Contract Expiration | Contract Term | Days to Contract Expiration | Account Nbr | Circuit Nbr | Circuit Type |
|---|---|---|---|---|---|
| 6/30/07 | 36 months | **Renegotiate - Only 19 days left!** | 80022161956 | DTEC 00006473 ATF | High Speed |
| 5/15/09 | 24 months | 704 | | 987654321 | Frame Relay LA |
| 5/28/09 | 24 months | 717 | | 34256785432 | Frame Relay ATM |
| 10/28/09 | 36 months | 870 | 80022161949 | DTEC 00000901 ATF | High Speed |
| 3/31/10 | 36 months | 1,024 | EVHUS4H-9094819 | EVHUS4H-9094819 | MPLS |

### MCI #5800501

| Contract Expiration | Contract Term | Days to Contract Expiration | Account Nbr | Circuit Nbr | Circuit Type |
|---|---|---|---|---|---|
| 12/28/06 | 18 months | Expired! | 00058395 | WOH-55278 | Frame Relay LA |
| 12/28/06 | 26 months | Expired! | 00058395 | WOG-23088 | Frame Relay LA |
| 12/28/06 | 30 months | Expired! | 00058395 | WOG-26390 | Frame Relay LA |
| 12/28/06 | 35 months | Expired! | 00058395 | WOF-57494 | Frame Relay LA |
| 12/28/06 | 42 months | Expired! | 00058395 | WOC-59037 | Frame Relay LA |
| 12/28/06 | 42 months | Expired! | 00058395 | WOD-15974 | Frame Relay LA |
| 12/28/06 | 48 months | Expired! | 00058395 | WOC-84236 | Frame Relay LA |
| 12/28/06 | 6 months | Expired! | 00058395 | WOD-23542 | Frame Relay LA |
| 12/28/06 | 6 months | Expired! | 00058395 | WOF-55512 | Frame Relay LA |
| 12/28/06 | 6 months | Expired! | 00058395 | WOJ-19795 | Frame Relay LA |
| 12/28/06 | 6 months | Expired! | 00058395 | WOK-40007 | Frame Relay LA |
| 12/28/06 | 9 months | Expired! | 00058395 | WOC-96733 | Frame Relay LA |

### SBC - Dallas TX

| Contract Expiration | Contract Term | Days to Contract Expiration | Account Nbr | Circuit Nbr | Circuit Type |
|---|---|---|---|---|---|
| 8/31/07 | 24 months | **Renegotiate - Only 81 days left!** | 50875808638652 | 5087580863 | Local PRI |

## AnchorPoint SSRS Reporting

AnchorPoint 6.0 and higher leverages Microsoft SQL Server 2005 providing the added benefits of the integrated Microsoft.Net infrastructure. Microsoft's latest edition of SQL Server includes Reporting Services (SSRS), Service Broker (SSSB) and Integration Services (SSIS) all facilitating easier reports usage and data management.

Server 2005 Reporting Services is a new server-based reporting platform that you can use to create and manage tabular, matrix, graphical, and free-form reports that contain data from relational and multidimensional data sources. The reports that you create can be viewed and managed over a Web-based connection. Output formats include HTML, PDF, TIFF, Excel, CSV, and more.

AnchorPoint 6.0 and higher delivers a pre-configured set of reports to help you analyze your business data. Most reports have sortable column heads, and in some cases interactive elements that bring you more detail or nested reports.

AnchorPoint

**Invoice Watched Transactions Report**

Page: 1 of 1

| Vendor | Account Number | BTN | Item Type | In Dispute | Dispute Date | Dispute Operator |
|---|---|---|---|---|---|---|
| Alltel | 10-0985-01540 | | Circuit | ✓ | 5/14/2007 | tammy |

| Transaction Description | Transaction Amount | Transaction Type | Date Appeared |
|---|---|---|---|
| Overcharge of Monthly Port Charge | -100.00 | ATF/PRIMC | |

| Vendor | Account Number | BTN | Item Type | In Dispute | Dispute Date | Dispute Operator |
|---|---|---|---|---|---|---|
| ATT Frame Relay | 80022161931 | 22H86904 01AII | Circuit | ✓ | 3/30/2007 | apmgilbert |

| Transaction Description | Transaction Amount | Transaction Type | Date Appeared |
|---|---|---|---|
| Late fee incorrectly billed | 25.00 | Late Pay | 3/30/2007 |

| Vendor | Account Number | BTN | Item Type | In Dispute | Dispute Date | Dispute Operator |
|---|---|---|---|---|---|---|
| Bell South - Charlotte NC | 561 283-1546 001 0453 | 561-283-1546 | Circuit | ✓ | 5/13/2007 | tammy |

| Transaction Description | Transaction Amount | Transaction Type | Date Appeared |
|---|---|---|---|
| Late Payment Fee Credit | 5.00 | Late Pay | 10/15/2006 |

| Vendor | Account Number | BTN | Item Type | In Dispute | Dispute Date | Dispute Operator |
|---|---|---|---|---|---|---|
| Sprint Wireless | 0168566354 | | Extension | ✓ | 4/28/2007 | apmgilbert |

| Transaction Description | Transaction Amount | Transaction Type | Date Appeared |
|---|---|---|---|
| Late Payment Fee Should not be paid | 17.11 | Late Pay | 3/1/2007 |

AnchorPoint

Page: 1 of 21

## Invoice Reconciliation History Report

| Invoice Number | Invoice Date | Previous Balance | Payments | Credits | Charges | Amount Due | Voucher Date | Voucher ID | Check Number | Check Date | Check Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Vendor: Alltel Account Number: 1 | | | | | | | | | | | |
| 88090023 | 4/1/2007 | 25,234.00 | 26,214.18 | 0.00 | 2,214.18 | 1,234.00 | 5/8/2007 | 200412080001 | | | |
| Most Recent Invoice is Not Present in the Database | | | | | | | | | | | |
| Vendor: Alltel Account Number: 10-0985-01540 | | | | | | | | | | | |
| 031405 | 5/14/2007 | 1,964.70 | 1,964.70 | 0.00 | 4,029.40 | 2,014.70 | 5/22/2007 | 200503220001 | | | |
| 12132004 | 4/14/2007 | 0.00 | 0.00 | 0.00 | 1,964.70 | 1,964.70 | 5/19/2007 | 200606190001 | | | |
| Most Recent Invoice is Not Present in the Database | | | | | | | | | | | |
| Vendor: ATT Frame Relay Account Number: 80022161931 | | | | | | | | | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200393 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200394 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200395 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200396 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200397 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200398 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200399 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200400 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200401 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200402 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200403 | | | |
| 1670467674E | 12/28/2006 | 0.00 | 0.00 | 0.00 | 49,058.45 | 49,058.45 | 5/20/2007 | 200410200404 | | | |

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Page: 1 of 1

## Invoice Summary Report

| Vendor | Account Number | BTN | Invoice Number | Invoice Date | Amount Due |
|---|---|---|---|---|---|
| Master Vendor: AT&T | | | | | 75,367.99 |
| ⊟ATT - Baltimore MD | | | | | 1,571.22 |
| | ⊞EVHU54H.9094819 | | EVHU54H-90948190107 | 04/15/2007 | 1,571.22 |
| ⊟ATT Frame Relay | | | | | 73,796.77 |
| | ⊟80022161931 | 22H86904 01AII | 16704676741 | 04/07/2007 | 61,932.77 |
| | Due Date: 05/26/2007 | Billing Period: 04/01/2007 - 04/28/2007 | Current Charges: | | 61,932.77 |
| | Invoice Status: Final Approval | Billing Freq/Cost Factor: Recurring Monthly (1.00) | Amount Approved: | | |
| | Payment Status: A/P Paid | PO Number: | Amount Vouchered: | | 61,932.77 |
| | ⊞80022161949 | 22H86904 01ARG | 16704676783J | 04/07/2007 | 11,864.00 |
| Master Vendor: Alltel | | | | | 5,213.40 |
| ⊟Alltel | | | | | 5,213.40 |
| | ⊞1 | 1 | 88090023 | 04/01/2007 | 1,234.00 |
| | ⊞10-0985-01540 | | 12132004 | 04/14/2007 | 1,964.70 |
| | ⊞10-0985-01540 | | 031405 | 05/14/2007 | 2,014.70 |

Clicking here drills to the Invoice Detail Report for the selected Invoice

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## Invoice Detail Report

Page: 1 of 6

Vendor: ATT Frame Relay
Account Number: 80022151931
BTN: 22H86904 01AII
Invoice Number: 1670467674I
Invoice Date: 4/7/2007
Billing Period: 4/1/2007 - 4/28/2007
P.O. Number:
Billing Frequency: Recurring Monthly
Due Date: 5/28/2007
Cost Factor: 1.00
Grouped By: Transaction Category
Payment Status: A/P Paid

Invoice Status: Final Approval
Previous Balance: 0.00
Total Payments: 0.00
Past Due Amount: 0.00
Total Credits: 0.00
Total Debits: 61,932.77
Total (Non-allocated): 61,932.77
Total (Allocated): 0.00
Total Current Charges: 61,932.77
Total Amount Due: 61,932.77
Total Vouchered: 61,932.77
Total Approved: 0.00

Distributed Transactions

| Date | Trans Type | Item | Organization | % of Chg | GL Acct. Code | Trans Amt | Amt To Pay | Amt Paid | Disputed | Approved | Allocated | Appr. Date | Appr By |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 4/28/2007 | ATF/PLONE | Dst ATF/PLONE | 6000V | 100.00 | 002-8934845-006 | 654.49 | 0.00 | 654.49 | N | N | Y | 2/20/2008 | brianm |
| Desc.: Private Line One Time Charges | | | | | | | | | | | | | |
| 4/28/2007 | ATF/PLONE | Dst ATF/PLONE | 6000V | 100.00 | 002-8934845-006 | 66.20 | 0.00 | 66.20 | N | N | Y | 2/20/2008 | brianm |
| Desc.: Private Line One Time Charges | | | | | | | | | | | | | |
| 4/28/2007 | ATF/PLTAX | Dst ATF/PLTAX | 6000V | 100.00 | 002-8934845-008 | 5.49 | 0.00 | 5.49 | N | N | Y | 2/20/2008 | brianm |
| Desc.: Private Line Taxes & Surcharges | | | | | | | | | | | | | |
| 4/28/2007 | ATF/PLTAX | Dst ATF/PLTAX | 6000V | 100.00 | 002-8934845-008 | 53.81 | 0.00 | 53.81 | N | N | Y | 2/20/2008 | brianm |
| Desc.: Private Line Taxes & Surcharges | | | | | | | | | | | | | |
| | | | | | Totals: | 779.99 | 0.00 | 779.99 | | | | | |

Circuit Transactions

| Date | Trans Type | Item | Organization | % of Chg | GL Acct. Code | Trans Amt | Amt To Pay | Amt Paid | Disputed | Approved | Allocated | Appr. Date | Appr By |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 4/28/2007 | ATF/HSSTX | Cir ATF/DTEC 00001093 ATF | 5962221 | 100.00 | 002-8934845-001 | 54.49 | 0.00 | 54.49 | N | N | Y | 2/20/2008 | brianm |
| Desc.: HSS Taxes & Surcharges | | | | | | | | | | | | | |
| 4/28/2007 | ATF/PRTMC | Cir ATF/DTEC 00001093 ATF | 5962221 | 100.00 | 002-8934845-009 | 1,515.93 | 0.00 | 1,515.93 | N | N | Y | 2/20/2008 | brianm |
| Desc.: Port Monthly Charges | | | | | | | | | | | | | |
| 4/28/2007 | ATF/PVCMC | Cir ATF/DTEC 00001093 ATF | 5962221 | 100.00 | 002-8934845-012 | 369.18 | 0.00 | 369.18 | N | N | Y | 2/20/2008 | brianm |
| Desc.: PVC Monthly Charges | | | | | | | | | | | | | |
| 4/28/2007 | ATF/HSSTX | Cir ATF/DTEC 00002469 ATF | 6910H | 100.00 | 002-8934845-001 | 133.53 | 0.00 | 133.53 | N | N | Y | 2/20/2008 | brianm |

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## Chargeback Report

Page: 1 of 1

Period: 5/1/2007 - 5/28/2007

| Organization | Organization Name | Total Calls | Total Duration | Usage Charges | Equipment Charges | Recurring Charges | Other Charges & Credits | Total Charges |
|---|---|---|---|---|---|---|---|---|
| 62991H | | | 02:30 | 7.528 | 11,144.83 | 11,139.08 | 1,379.53 | 23,670.968 |
| 6633771 | | | 01:50 | 0.660 | 5,171.15 | 1,293.16 | 1,780.29 | 8,245.260 |

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Clicking here allows you to drill into the Chargeback Detail Report for that Cost Center / Organization you have responsibility for.



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Page: 1 of 1

## Chargeback Detail Report

**Period: 5/1/2007 - 5/28/2007**

**Organization:** 62991H - Sales

Clicking here allows you to drill into the Organization Charge Summary Report for the Cost Center / Organization you have responsibility for.

| Employee Name | [illegible] | Total Duration | Usage Charges | Equipment Charges | Recurring Charges | Other Charges & Credits | Total Charges |
|---|---|---|---|---|---|---|---|
| ⊞ Org: 62991H | [illegible] | [illegible] | [illegible] | 15.00 | 10,416.00 | 126.98 | 10,557.980 |
| ⊞ Adame, Eden | [illegible] | [illegible] | [illegible] | 2.00 | 6.12 | 0.00 | 8.120 |
| ⊞ Aguirre, Mariani | [illegible] | [illegible] | [illegible] | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Amarullah, Trynne L | [illegible] | [illegible] | [illegible] | 130.00 | 2.00 | 0.00 | 132.000 |
| ⊞ Anandan, Julie | [illegible] | [illegible] | [illegible] | 8.00 | 18.36 | 0.00 | 26.360 |
| ⊞ Arora, Lorri | 0 | 00:00:00 | 0.000 | 130.00 | 2.00 | 0.00 | 132.000 |
| ⊞ Athletics, Diane | 0 | 00:00:00 | 0.000 | 2.00 | 1.12 | 0.00 | 3.120 |
| ⊞ ATH-Media Relations, Edward | 0 | 00:00:00 | 0.000 | 204.00 | 0.00 | 0.00 | 204.000 |
| ⊞ Baehr, Billy D | 0 | 00:00:00 | 0.000 | 237.00 | 0.00 | 0.00 | 237.000 |
| ⊞ Baez-Franceschi, Michael L. | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Baker, LISA | 0 | 00:00:00 | 0.000 | 2.00 | 1.12 | 0.00 | 3.120 |
| ⊞ Barroso, John | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Berry, Greta | 0 | 00:00:00 | 0.000 | 4.00 | 6.12 | 0.00 | 10.120 |
| ⊞ Bhargava, Grad/undergrad | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Bible, Pat | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Borlase, Ron | 0 | 00:00:00 | 0.000 | 130.00 | 2.00 | 0.00 | 132.000 |
| ⊞ Boyett, Data processing | 1 | 00:07:46 | 0.000 | 8.00 | 18.36 | 0.00 | 26.360 |
| ⊞ Bracke, Shiv | 0 | 00:00:00 | 0.000 | 92.00 | 7.24 | 0.00 | 99.240 |
| ⊞ Braimmer, Maged E | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Branz, Janet | 0 | 00:00:00 | 0.000 | 130.00 | 2.00 | 0.00 | 132.000 |
| ⊞ Brower, Ming | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Bryand, Velma | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |
| ⊞ Bukkock, Tenisha | 0 | 00:00:00 | 0.000 | 2.00 | 0.00 | 0.00 | 2.000 |

AnchorPoint

Page: 1 of 1

## Organization Charge Summary

| | |
|---|---|
| **Period Range:** | 5/1/2007 - 5/28/2007 |
| **Organization:** | 62991H |
| **Organization Name:** | Sales |
| **Directory Listing:** | Sales Department - Boston |
| **Contact:** | Le Hrom's |
| **Employees:** | 166 |

Clicking here allows you to drill into Chargeback Detail Report showing all employees in the Cost Center / Organization you have responsibility for.

| Usage | Calls | Minutes | Cost |
|---|---|---|---|
| Local Calls | 9 | 00:35:54 | 0.000 |
| Long Distance | 12 | 00:24:12 | 1.720 |
| Service | 23 | 01:37:26 | 0.000 |
| Wireless | 10 | 01:24:58 | 5.808 |
| **Total:** | 54 | 04:02:30 | 7.528 |

| Inventory | Cost |
|---|---|
| Circuit Monthly Charges (Qty:84) | 10,416.000 |
| Data Connection Types (Qty:73) | 7,262.000 |
| Data Equipment (Qty:41) | 2,624.000 |
| Extension Monthly Charges (Qty:208) | 617.080 |
| IT Asset Monthly Charges (Qty:53) | 106.000 |
| Phone Features (Qty:2) | 17.000 |
| Voice Equipment (Qty:51) | 729.830 |
| Voicemail Monthly Charge (Qty:256) | 512.000 |
| **Total:** | 22,283.910 |

| Other | Cost |
|---|---|
| Extension Transactions (Qty:35) | 1,252.550 |
| Repair Order Charges (Qty:1) | 40.000 |
| Work Order Charges (Qty:1) | 86.980 |
| **Total:** | 1,379.530 |

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From the Chargeback Detail Report you can drill down to the Call Detail Report which show alls calls for the selected employee.

SQL Server Reporting Services
Home > AnchorPoint Reports > Monthly Management >
Chargeback Detail Report

…riptions | Site Settings | Help

View | Properties | History | Subscriptions

New Subscription

1 of 1 | 100% | Hoppe | Find | Next | Select a form… | Export

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Hoppe, Erica** | **22** | **01:49:10** | 7.528 | **89.25** | **1.12** | **0.00** | 97.898 |
| Aut CCI/******7406 | 22 | 01:49:10 | 7.528 | 0.00 | 0.00 | 0.00 | 7.528 |
| Ext CCI/6422506317 | N/A | 00:00:00 | 0.000 | 85.25 | 1.12 | 0.00 | 86.370 |
| VM CCI/60413 | N/A | 00:00:00 | N/A | 2.00 | 0.00 | 0.00 | 2.000 |
| VM CCI/6422506317 | N/A | 00:00:00 | N/A | 2.00 | 0.00 | 0.00 | 2.000 |

AnchorPoint

Page: 1 of 1

## Call Detail Report

**Period: 5/1/2007 - 5/28/2007**

**Organization: 62991H - Sales**

**Employee Name: Hoppe, Erica**

| Call Type | Date | Time | Location | Number Dialed | Usage Charges | Total Duration | Call Identification | Alloc / Site & Asset |
|---|---|---|---|---|---|---|---|---|
| **Long Distance** | 5/22/2007 | 12:19 | CARLSBAD CA | 917606921064 | 0.890 | 00:13:49 | | U CCI/******7406 |
| | 5/9/2007 | 13:31 | TUSKEGEE AL | 913347271437 | 0.064 | 00:00:47 | | U CCI/******7406 |
| | 5/18/2007 | 18:27 | MONTGOMERY AL | 913349535302 | 0.064 | 00:00:56 | | U CCI/******7406 |
| | 5/8/2007 | 13:59 | TUSKEGEE AL | 913347271111 | 0.064 | 00:00:50 | | U CCI/******7406 |
| | 5/13/2007 | 13:10 | TUSKEGEE AL | 913347271292 | 0.064 | 00:00:38 | | U CCI/******7406 |
| | 5/21/2007 | 17:20 | TUSKEGEE AL | 913347271292 | 0.064 | 00:00:38 | | U CCI/******7406 |
| | 5/15/2007 | 13:49 | TUSKEGEE AL | 913347271437 | 0.064 | 00:00:47 | | U CCI/******7406 |
| | 5/9/2007 | 18:19 | TUSKEGEE AL | 913347271437 | 0.064 | 00:00:47 | | U CCI/******7406 |
| | 5/15/2007 | 14:02 | TUSKEGEE AL | 913347271111 | 0.064 | 00:00:50 | | U CCI/******7406 |
| | 5/16/2007 | 14:23 | TUSKEGEE AL | 913347271111 | 0.064 | 00:00:50 | | U CCI/******7406 |
| | 5/3/2007 | 13:18 | FAYETTEVL AR | 914795757102 | 0.127 | 00:01:40 | | U CCI/******7406 |
| | 5/3/2007 | 14:01 | FAYETTEVL AR | 914795757102 | 0.127 | 00:01:40 | | U CCI/******7406 |
| **Wireless** | 5/15/2007 | 16:24 | SANANTONIO TX | 912106522274 | 0.132 | 00:01:41 | | U CCI/******7406 |
| | 5/15/2007 | 11:08 | SANANTONIO TX | 912106522274 | 0.396 | 00:05:47 | | U CCI/******7406 |
| | 5/9/2007 | 09:36 | SANANTONIO TX | 912106522274 | 3.960 | 00:59:34 | | U CCI/******7406 |
| | 5/9/2007 | 17:07 | SANANTONIO TX | 912106522051 | 0.066 | 00:00:26 | | U CCI/******7406 |
| | 5/15/2007 | 16:42 | SANANTONIO TX | 912106522274 | 0.396 | 00:05:47 | | U CCI/******7406 |
| | 5/3/2007 | 09:22 | SANANTONIO TX | 912105654152 | 0.066 | 00:00:55 | | U CCI/******7406 |
| | 5/16/2007 | 09:38 | SANANTONIO TX | 912105654152 | 0.330 | 00:04:29 | | U CCI/******7406 |
| | 5/9/2007 | 16:20 | SANANTONIO TX | 912105654152 | 0.066 | 00:00:55 | | U CCI/******7406 |
| | 5/8/2007 | 17:17 | SANANTONIO TX | 912105654152 | 0.330 | 00:04:29 | | U CCI/******7406 |
| | 5/5/2007 | 12:37 | SANANTONIO TX | 912105654152 | 0.066 | 00:00:55 | | U CCI/******7406 |
| | | | | **Grand Total:** | **7.528** | **01:49:10** | | |

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## AnchorPoint Standard Reports Listing

**Call Accounting Reports**

- Report Distribution Security
- Call Accounting -> Authorization Code
- Authorization Code -> Allocations Report
- Calling Card -> Allocations Report
- Detail Inquiry -> Archived Calls
- Detail Inquiry -> Current Calls
- Summary Inquiry -> Archived Calls
- Summary Inquiry -> Current Calls
- Call Costing Summary by Date – Archived
- Call Costing Summary by Date – Current
- CDR Import Log
- Costed Call Summary by Access Code
- Costed Call Summary by Trunk
- Costing Error Exception
- Costing/Allocation Exception
- Nêtwork Security
- Special Numbers Summary
- Unallocated Calls Detail
- Unallocated Calls Summary
- Call Summary Usage Bill
- Detail Bill
- Charge Summary
- Consolidated Transaction
- Organization Call Type Graph
- Organization Rollup Summary
- Summary Bill
- Authorization Code
- Calling Card
- Calling Card Transaction
- Special Number
- Site Configuration
- Call Cost Exception (Archived)
- Call Cost Exception (Current)
- Call Volume Exception (Archived)
- Call Volume Exception (Current)
- Duration Exception (Archived)
- Duration Exception (Current)
- Frequent Calls (Current)
- Frequent Calls (Archived)
- Area Code Summary

**Invoice Management Reports**

- Invoice Maintenance - Invoice Taxable Transactions Report
- Voucher Generation
- Disputed Calling Cards
- Disputed Circuits
- Disputed Connectors
- Disputed Extensions
- Disputed IT Assets
- Disputed Vendor Accounts
- Invoice Usage Exception
- Invoice Detail
- Invoice History
- Invoice History Graph
- Invoice Summary
- Invoice Variance
- Invoice Tax Diagnostic
- Contract Expiration
- Vendor Account
- Payment Voucher Summary

**Voice Inventory Reports**

- Allocations Report
- Extension (Abbreviated)
- Extension (Full report)
- Extension Notepad
- Extension Transaction
- Spare Extension
- Installed Data Equipment (for voice equipment)
- Installed Phone Equipment
- Phone – Abbreviated
- Phone (full report)
- Phone Cabling
- Voice Mail
- Card Map
- Port Address
- Application Code
- Vendor
- Feature

- Location Summary
- Trunk Group Utilization by Day (archived)
- Trunk Group Utilization by Day (current)
- Trunk Group Utilization by Trunk Group (archived)
- Trunk Group Utilization by Trunk Group (current)
- Trunk Utilization by Day (archived)
- Trunk Utilization by Day (current)
- Trunk Utilization by Trunk (archived)
- Trunk Utilization by Trunk (current)
- Trunks with No Usage
- Apply Monthly Charges
- Apply Volume Discounts
- Application Log (and Report)
- Archive Rated Calls
- Allocate Call Records
- Allocate Unallocated Call Records
- Cost Call Records
- Authorization Code
- Delete Utilities -> Calling Card
- Transaction Utilities -> Calling Card

**Data Inventory Reports**

- Circuit
- Circuit Confirmed Working
- Circuit Transaction
- Composite Circuit
- Connector
- Connector Confirmed Working
- Connector Transaction
- IT Asset
- Installed Data Equipment (for data equipment)
- Circuit Type
- Connection Type
- Connector Equipment
- Connector Equipment Use
- Data Equipment
- Data Equipment Use
- Encapsulation Type
- IP Type

**General Accounting Reports**

- Corporate Year to Date Call Type Graph
- Employee Allocation Trend

- Phone Button Template
- Phone Equipment
- Coverage Path
- Hunt Group
- Intercom Group
- Pickup Group
- Speed Group
- Extension

**Service Order Reports**

- Order Options
- Work Order Project (Update Project Status - W/O Close Report)
- Repair Order
- Repair Order Operator
- Repair Order Past Due
- Repair Order Summary
- Repair Order Technician Statistics
- Repair Order Trouble Code Statistics
- Move Work Order
- Project
- Project Log
- Project Management Statistics
- Project Status Statistics
- Task Management Statistics
- Technician Management Statistics
- Work Order Equipment Source Statistics
- Work Order Management Statistics
- Work Order Service Type Statistics
- Work Order
- Work Order by Due Date
- Work Order Charges
- Work Order Past Due
- Work Order Status
- Action Code
- Pricing Plan
- Trouble Code
- Custom Type

| | |
|---|---|
| • Employee Allocation Trend Graph<br>• Employee Usage Credit Limit<br>• Organization Allocation Trend<br>• Year to Date Call Type Graph<br>• Year to Date Summary | • Pricing Plan<br>• Task |
| **Core Reports**<br><br>• Employee -> Allocations Report<br>• Organization -> Allocations Report<br>• Employee<br>• Employee Ownership<br>• Employee Without Ownership<br>• Organization – Abbreviated<br>• Organization (full report)<br>• Organization Function<br>• Organization Hierarchy<br>• Organization Transaction<br>• Location<br>• Transaction Type<br>• Organization | **Transaction Import Reports**<br><br>• Calling Card Transaction<br>• Circuit Transaction<br>• Connector Transaction<br>• Extension Transaction<br>• Organization Transaction |
| **Directory Reports**<br><br>• Directory (Different by Customer) | **E911 Reports**<br><br>• E911 (Different by Customer) |
| **Update Reports**<br><br>• Employee<br>• Extension<br>• Organization<br>• Report Distribution Security<br>• Invoice Organization Default<br>• Invoice Site Translation<br>• Invoice Vendor Translation<br>• Invoice Transaction Type Translation | **PhoneMaster Reports**<br><br>• Employees Added by Update Database<br>• Employees Without Ownership<br>• Extensions Added by Update Database<br>• Extensions Not Defined on Switch<br>• Phones Added by Update Database<br>• Update Database<br>• Update Speed Groups |

Appendix G:

AnchorPoint Service Order

The AnchorPoint Service Order Management is a component of Asset Management. It provides a seamless system for tracking Move, Add, & Change (MAC) activity, your assets, the assignment of tasks to technicians and vendors, and the associated costs throughout the AnchorPoint suite.

- Organization – Work orders can assign an organization to an extension, authorization code, calling card, IT Asset, and phone. Work order and repair order charges can be posted and allocated to an organization.
- Employee – Employee Work Orders add and update employee records. Work orders assign employees to extensions, authorization codes, calling cards, and IT Assets.
- Report Distribution Security – Defines how AnchorPoint reports are parsed for email and web access distribution. Can be updated when email address changes are made to Employees.
- Extension – Extension Work Orders add, update, and delete extension records. The Extension Add and Change Work Orders maintain all extension database fields. Repair Orders can also be created for extensions and will assign the extension the In Repair status until the repair order is closed. (Requires Usage Management)
- Authorization Code – Authorization Code Work Orders add, update, and delete authorization code records. The Authorization Code Add and Change Work Orders maintain all authorization code database fields. (Requires Usage Management)
- Calling Card – Calling Card Work Orders add, update, and delete calling card records. The Calling Card Add and Change Work Orders maintain all extension database fields. (Requires Usage Management)
- Phone – Phone Work Orders add, update, and delete phone records. The Phone Add and Change Work Orders maintain all phone database fields. Repair Orders can also be created for phones and will assign the phone the In Repair status until the repair order is closed.
- Phone Equipment – Phone Add and Change Work Orders assign phone equipment to a phone. Before the work order is updated to Closed status, the equipment unit is counted as Pending Installation in the Phone Equipment inventory. The equipment unit is counted as Installed when the work order is closed. Phone Equipment is counted as Pending Disconnect when pending Phone Change and Disconnect Work Orders propose to remove equipment. The equipment is counted as Spare when the work order is closed.
- Voice Mail – Voice Mail Work Orders add, update, and delete voice mail records. The Voice Mail Add and Update Work Order maintain all voice mail database fields. Repair Orders can also be created for voice mail addresses and will assign the voice mail the In Repair status until the repair order is closed.
- IT Asset – IT Asset Work Orders add, update, and delete IT Asset records. The Phone Add and Change Work Orders maintain all IT Asset database fields. Repair Orders can also be created for IT Asset and will assign the IT Asset the In Repair status until the repair order is closed.

- IT Asset Equipment – IT Asset Add and Change Work Orders assign equipment to an IT Asset. Before the work order is updated to Closed status, the equipment unit is counted as Pending Installation in the Data Equipment inventory. The equipment unit is counted as Installed when the work order is closed. Data Equipment is counted as Pending Disconnect when pending IT Asset Change and Disconnect Work Orders propose to remove equipment. The equipment is counted as Spare when the work order is closed.
- Port Address – Extension and Phone Workstations assign, reassign, and disconnect extensions and phones from port addresses. When assigning a port address, you can search for an applicable port by port type—such as analog or digital. The work order process places the proposed assignment of a port address in a Pending status until the work order is closed. When the work order is closed, the port address is assigned the In Use status.

Security

AnchorPoint Security defines the Service Order functions that each user has permission to use. There are four levels of Service Order security including Manager, Analyst, Dispatcher (the staff person who assigns Work Order Tasks and Repair Order to technicians), and Technician (the person or vendor responsible for performing a Work Order Task or responding to a Repair Order).

Tools to ease database maintenance

- Purge Project/Work Orders - Work orders remain in the database until they are deleted or purged. The Project/Work Order Purge utility allows the Service Order Manager to globally delete Projects and Work Orders that precede a selected date.
- Purge Repair Orders - Repair orders remain in the database until they are deleted or purged. The Repair Order Purge utility allows the Service Order Manager to globally delete repair orders precede a selected date.
- Organization Replace – Replaces the assignment of an Organization with another throughout the database including Work Orders and Repair Orders.
- Employee Replace – Replaces the assignment of an employee with another selected employee throughout the database, including work orders.
- Equipment Replace – Replaces the assignment of a Phone or IT Asset Equipment code with another throughout the database, including work orders.

Work Order Projects

- A Project is a collection of related work orders. A Project may have one work order or multiple work orders. The work orders may be of different types—for example, a Change Extension, an Add Phone, and an Add Voice Mail Work Order may be combined under one project.
- The Project Number may be automatically generated by AnchorPoint. The user defines the format of the system generated format. Use of this feature is optional.
- The Project can be managed—as well as the individual work orders. The Project has a Project Number, Status, Order Date, Due Date, Completion Date, Priority, Project Manager, and Entry Operator.
- You can update the Project Status and optionally automatically update the Work Order Status for all work orders that are assigned to the Project. Project Status options include Received, Verified, Assigned, Hold, Cancelled, and Closed.
- Project Log provides a history of events. Project Log lists all change events that occurred for the project and its work orders. Every Project Status and Work Order Status change is recorded by the Project Log.
- Project Email – You can send via email a project status message to the Project's Contact person.
- Web Service Order – Allows the IT/telecom's user community to submit a request for service via a Web Service Order page. The Web Service Order creates a Project in the AnchorPoint database to be further defined and managed. The Web Service Order page can be tailored by the AnchorPoint user. AnchorPoint provides sample HTML for user modification.

## Work Orders

- Work Orders are associated with a Project. A Project may consist of one work order or multiple work orders—such as a Project to move all employees and employee services for a given department.
- Archived work orders provide the history of services provided. Work Order Project Search allows you to display all closed work orders for which service was provided to a specific extension, phone, voice mail address, or IT Asset.

## Work Order – Standard Fields

For each work order the following fields may be defined:

- Site – Defined by Project.
- Project – Defined by Project.
- Work Order Number – Can be system generated.
- Status – Options including Received, Verified, Assigned, Hold, Cancelled, and Closed.
- Order Date/Time – Can be system generated.
- Due Date/Time – Can be system generated.
- Completion/Time – Can be system generated.
- Entry Operator – Defaulted from Project.
- Priority – Defaulted from Project.
- Contact – Defaulted from Project.
- Contact Phone – Defaulted from Project.
- Contact Email – Defaulted from Project.
- Contact user definable field – Defaulted from Project.
- Work Order Charges Tab
- Work Order Tasks Tab
- Work Order Charges are entered on the Work Order Charges tab.
- Charges are allocated to the Organization to Charge with the work order is updated to Closed status. The Organization to Charge defaults to the organization that is assigned to the Employee, Extension, Voice Mail, Calling Card, Authorization Code, or IT Asset. Another organization may be assigned.
- On the Work Order Charges Tab there are ten (10) work order charge fields. You can customize the field description and application of these ten fields.
- Pricing Plans can be applied to the Work Order Charges Tab. Pricing Plans are predefined and provide a tool for defining standard service rates.
- The charges that are applied to a work order can be modified at any time up until the time that the work order status is updated to Closed.
- Work order charges are reported in the standard AnchorPoint Cost Allocation Reports, including the Detail Bill.
- Work Order Tasks – Use to manage the events and tasks that must be completed in order to deliver service.
- The specific jobs or tasks that are required to deliver the requested service are define and managed on the Work Order Tasks Tab.
- An unlimited number of tasks can be assigned to a work order.
- For each task, the following information may be managed:
- Task code – User defined in Task Code database table

- Status – Received, Verified, Assigned, Hold, Closed, and Cancelled
- Technician – the party responsible for task
- Assigned Date/Time
- Due Date/Time
- Closed Date/Time – when the task is completed
- Labor Hours – number of hours to complete the task
- Comments – text description

Work Order Types

- There are eight Work Order Types including Employee, Extension, Calling Card, Authorization Code, Phone, Voice Mail, IT Asset, and Custom. These Work Orders Types share common features and functions.
- AnchorPoint tracks the current configuration of the item (Extension, Phone, Data Work Station …) and the work order proposed configuration. When you enter text in a work order field, the proposed change—which will be implemented when the work order status is updated to closed, display in red type. Fields that have not changed display in black type.
- The Work Order updates that AnchorPoint database when the work order status is updated to Closed. For open work orders that propose installation of Phone Equipment or Data Work Order Station Equipment or the assignment of a Switch Port Address—these assets are identified as pending use in the database until the work order status is updated to Closed.
- Employee Work Order Add – This work order adds an employee to the database. All employee fields can be populated.
- Employee Work Order Change – This work order changes any and all fields for the selected employee. Note: There is no Employee Work Order Delete. Employees are deleted through Employee Maintenance or with use of the Employee Delete utility. You can also use Employee Work Order Change to update the Employee Status to an Inactive status.
- Extension Work Order Add – This work order adds an extension to the database. All extension fields can be populated.
- Extension Work Order Change –This work order changes any and all fields for the selected extension.
- Extension Work Order Disconnect – This work order deletes the extension from the database.
- Calling Card Work Order Add – This work order adds a calling card to the database. All calling card fields can be populated. (Requires Usage Management)
- Calling Card Work Order Change –This work order changes any and all fields for the selected calling card. (Requires Usage Management)
- Calling Card Work Order Disconnect –This work order deletes the calling card from the database. (Requires Usage Management)
- Authorization Code Work Order Add –This work order adds an authorization code to the database. All authorization code fields can be populated. (Requires Usage Management)
- Authorization Code Work Order Change – This work order changes any and all fields for the selected authorization code. (Requires Usage Management)
- Authorization Code Work Order Disconnect – This work order deletes the authorization code from the database. (Requires Usage Management)

- Phone Work Order Add – This work order adds a phone to the database. All phone fields can be populated.
- Phone Work Order Change – This work order changes any and all fields for the selected phone.
- Phone Work Order Move – This work order does not allow for the update of all Phone fields—it is used to move the location of a configured phone. Fields that can be changed include all location, outlet, and cable fields.
- Phone Work Order Disconnect – This work order deletes the phone from the database.
- Voice Mail Work Order Add – This work order adds a voice mail address to the database. All voice mail fields can be populated.
- Voice Mail Work Order Change – This work order changes any and all fields for the selected voice mail address.
- Voice Mail Work Order Disconnect – This work order deletes the voice mail address from the database.
- Data Work Station Work Order Add – This work order adds an IT Asset to the database. All data work station fields can be populated.
- Data Work Station Work Order Change – This work order changes any and all fields for the selected IT Asset.
- Data Work Station Work Order Move – This work order does not allow for the update of all IT Asset fields—it is used to move the location of a configured IT Asset. Fields that can be changed include all location, outlet, and IP Address fields.
- Data Work Station Work Order Disconnect – This work order deletes the IT Asset from the database.

Custom Work Order

- Allows user to create additional Work Order Types that are custom or specific to the user's environment. There is no limit to the number of Custom Work Order Types that can be created.
- For each Custom Work Order Type, user defines the application and field labels for 21 notepad fields. When the Custom Type Code is assigned to a Custom Work Order, these customized fields labels automatically display.
- All Standard Work Order Fields, including those provided on the Work Order Charges Tab and the Work Order Tasks Tab, are provided with the Custom Work Order.
- When the Custom Work Order status is updated to closed there is no change to the configuration of an asset—but Work Order Charges are allocated, Work Order Tasks and services have been managed, and there is a history of the provided service.

Dispatcher Search

- Dispatch Search is used to view pending work order tasks and repair orders and to assign these jobs to technicians—the providers of the service.
- The Dispatcher can view the complete work order. The Dispatcher can assign a Technician to each task, update the work order Status, Labor Hours, and the Closed Date and Time.

- Technical Search
- The Technician Search displays Work Order Tasks and Repair Orders with the Assigned Status and that are assigned to the Technician who has logged onto AnchorPoint.
- The technician can view the complete work order, but can only update the tasks that are assigned to the technician. The technician can update the Status, Comments, Complete Date, and Labor Hours for the Task. The technician can update the task status to Closed, but only a Dispatcher, Analyst, or Manager can update the work order status to Closed.

Work Order Reports

- Project – This report provides basic information for the selected projects. Information includes project status, due date, contact information, and project comments.
- Project Log – This report provides the information that is available in the Work Order Project Log. The Project Log and Project Log Report displays a list of status, task, technician, project manager assignment changes that have been made to the project, associated work orders and work order tasks. It allows you to trace a history of how the service request was managed. The Project Log also provides information for projects that have been Cancelled or Closed.
- Work Order – This report provides a complete description of the work to be performed. The work order will display current and proposed configuration information. For example, the IT Asset Work Order will display the current and the proposed location information for the phone.
- Move Work Order – This report provides the information needed to process Move Phone and Move IT Asset type work orders. In the Move work order, there are no station configuration changes, but there are changes to the location information.
- Work Order by Due Date – This report allows you to list work orders by Work Order Due Date. The work orders are sorted by Site, Due Date, and then by Project Number. For each work order, the work order due date, work order status, order date, and work order type is provided. Summary counts are provided for the work orders included in the report output.
- Work Order Past Due – This report identifies work orders that are, or were, past due.
- Work Order Status – This report lists work orders by status. For the selected work orders, the work orders are first sorted by Work Order Status. Status options include Received, Verified (which means that the request has been analyzed), Assigned (which means that the work has been assigned to technicians or service providers), Hold, Closed, and Cancelled. There is a report page break for each status. The listed work orders are described by site, project number, work order number, priority, order date, organization to charge, work order type, and the number of elapsed days.
- Work Order Charges – This report provides work order charges for the selected work orders. Information is sorted by accounting organization.
- Project Management Statistics – This management report provides summary statistics on the work orders by project.
- Project Status Statistics – This management report provides project statistics.

- Work Order Management Statistics – This management report provides management statistics.
- Work Order Operator– This management report provides total information on the number of projects and work orders logged by selected operators (users).
- Work Order Service Type Statistics – This management report provides work order service type statistics.
- Work Order Equipment Source Statistics – This management report provides work order equipment source statistics.
- Work Order Service Level – This management report provides a count of the number of times that you meet your service level goals and the number of times that you fail to meet your service level goals. The report counts the number of days that closed work orders remained open or pending for each Priority Level.
- Technician Management Statistics – This management report provides summary statistics of tasks for the selected technicians.
- Task Management Statistics – This management report provides summary statistics for tasks.

## Repair Order

Repair Orders are used to track requests for repair orders or "trouble calls", to manage the provision of services, to the track the history of problems, to manage work of service providers, and to chargeback for services.

Repair Orders can be manually entered or may be submitted electronically via the Web Service Order page.

- Web Service Order – Allows the IT/telecom's user community to submit a request for repair service via a Web Service Order page. The Web Service Order creates a Repair Order in the AnchorPoint database to be further defined and managed. The Web Service Order page can be tailored by the AnchorPoint user. AnchorPoint provides sample HTML for user modification.
- The Repair Order Number may be automatically generated by AnchorPoint. The user defines the format of the system generated format. Use of this feature is optional.
- Trouble Code – In the AnchorPoint database a list of trouble codes is defined. These are the problem codes that the user wants to assign to repair orders and to manage.
- Action Code – In the AnchorPoint database a list of action codes is defined to describe the response to the reported problem and repair service request. Action Codes are assigned to repair orders.
- Technician – In the AnchorPoint database, the technicians or vendor to whom repair orders will be assigned for service are defined. When the "technician" logs onto AnchorPoint and accesses the Technician Search window, all assigned Repair Orders and Work Order Tasks display. Repair Order services can be managed by technician.
- Project Email – You can send via email a project status message to the Project's Contact person.
- Archived repair orders for Extensions, Phones, Voice Mail, and IT Assets provide the history of problems and repair services. Repair Order Search allows you to display all pending and archived repair orders for a selected item.

## Repair Order – Standard Fields

For each repair order the following fields may be defined:

- Site
- Repair Order Number – Can be system generated.
- Status – Options including Received, Verified, Assigned, Hold, Cancelled, and Closed.
- Order Date/Time – Can be system generated.
- Due Date/Time – Can be system generated.
- Assign Date/Time – Can be system generated.
- Entry Operator
- Priority
- Contact
- Contact Phone

- Contact Email
- Contact user definable field
- Trouble Code – Selected from a predefined list
- Technician – Individual or vendor to whom the service is assigned
- Action Code – Selected from a predefined list to indicate the service provided.
- Labor Hours – Service time
- Repair Order Charges Tab
- Work Order Comments Tab
- Repair Order Charges Tab – To allocate service related charges
- Repair Order Charges are entered on the Repair Order Charges tab.
- Charges are allocated to the Organization to Charge with the repair order is updated to Closed status. The Organization to Charge defaults to the organization that is assigned to the Extension, Phone's Extension, Voice Mail, or IT Asset. Another organization may be charge for the repair order services.
- On the Repair Order Charges Tab there are ten (1 0) repair order charge fields. The user can customize the field description and application of these ten fields.
- Pricing Plans can be applied to the Repair Order Charges Tab. Pricing Plans are predefined and provide a tool for defining standard service rates.
- The charges that are applied to a repair order can be modified at any time up until the time that the repair order status is updated to Closed.
- Repair order charges are reported in the standard AnchorPoint Cost Allocation Reports, including the Detail Bill.

Repair Order Comments Tab

The Repair Order Comments tab provides two text sections—one to enter a Description of the problem and another to define the Resolution for the problem.

Repair Order Types

- There are four repair order types – Extension Repair Order, Phone Repair Order, Voice Mail Repair Order, and IT Asset Repair Order.
- Extension Repair Order – Displays key information for the extension including assigned Employee, Extension Application, IP Address, associated Voice Mail address, Port Address, and DID Number. The Extension is assigned the Repair status until the problem is resolved and the Repair Order is either cancelled or closed. (Requires Usage and Asset Management)
- Phone Repair Order – Displays key information for the phone including assigned Employee, all Location related information, installed Phone Equipment, and Button configuration. The Phone is assigned the Repair status until the problem is resolved and the Repair Order is either cancelled or closed. (Requires Asset Management)
- Voice Mail Repair Order – Displays key information for the voice mail address including all voice mail service configuration. The Voice Mail is assigned the Repair status until the problem is resolved and the Repair Order is either cancelled or closed.
- IT Asset Repair Order – Displays key information for the IT Asset including Workstation ID, Employee, Extension number, all Location related information,

and IP Address, The IT Asset is assigned the Repair status until the problem is resolved and the Repair Order is either cancelled or closed.

Dispatcher Search

- Dispatch Search is used to view pending work order tasks and repair orders and to assign these jobs to Technicians—the providers of the service.
- The Dispatcher can view the complete repair order. The Dispatcher can assign a Technician to the repair order, update the repair order Status and Labor Hours.

Technical Search

- The Technician Search displays Work Order Tasks and Repair Orders with the Assigned Status and that are assigned to the Technician who has logged onto AnchorPoint.
- For repair orders, the technician can update the Trouble Code, Action Taken Code, Labor Hours spent to resolve the problem, and the repair order Status. The technician can update the repair order status to Closed.

Purge Repair Order

- Repair orders remain in the database until they are deleted or purged. The Repair Order Purge utility allows the Service Order Manager to globally delete repair orders precede a selected date.

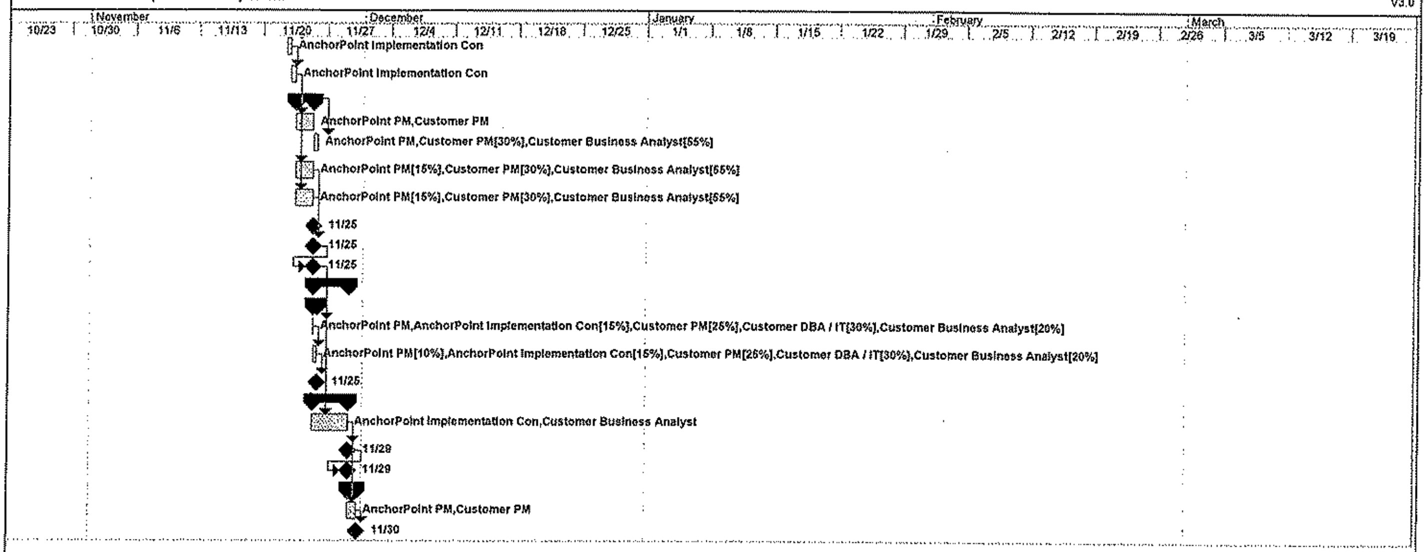
Repair Order Reports

- Repair Order – This report provides a complete description of the problem and any other information that might needed by a technician to resolve the problem.
- Pending Repair Order Summary – This report provides a list of repair orders with basic information for the selected orders.
- Repair Order Trouble Code Statistics – This management report provides statistical information for the number of times each type of trouble occurred, as well as the percentage of total troubles.
- Repair Order Technician Statistics – This management report provides statistical information for the number of times each technician is assigned as well as his percentage of total repair orders.
- Repair Order Operator– This management report provides statistical information on the number of repair orders each operator creates as well as his percentage of total repair orders.
- Repair Order Past Due – This report lists all repair orders that are past due–that is, they have not been closed and the due date has past. The report will identify the number of days past due.

# Appendix H:  AnchorPoint Sample Implementation Plan

AnchorPoint Draft TEM Implementation Project Plan

V3.0

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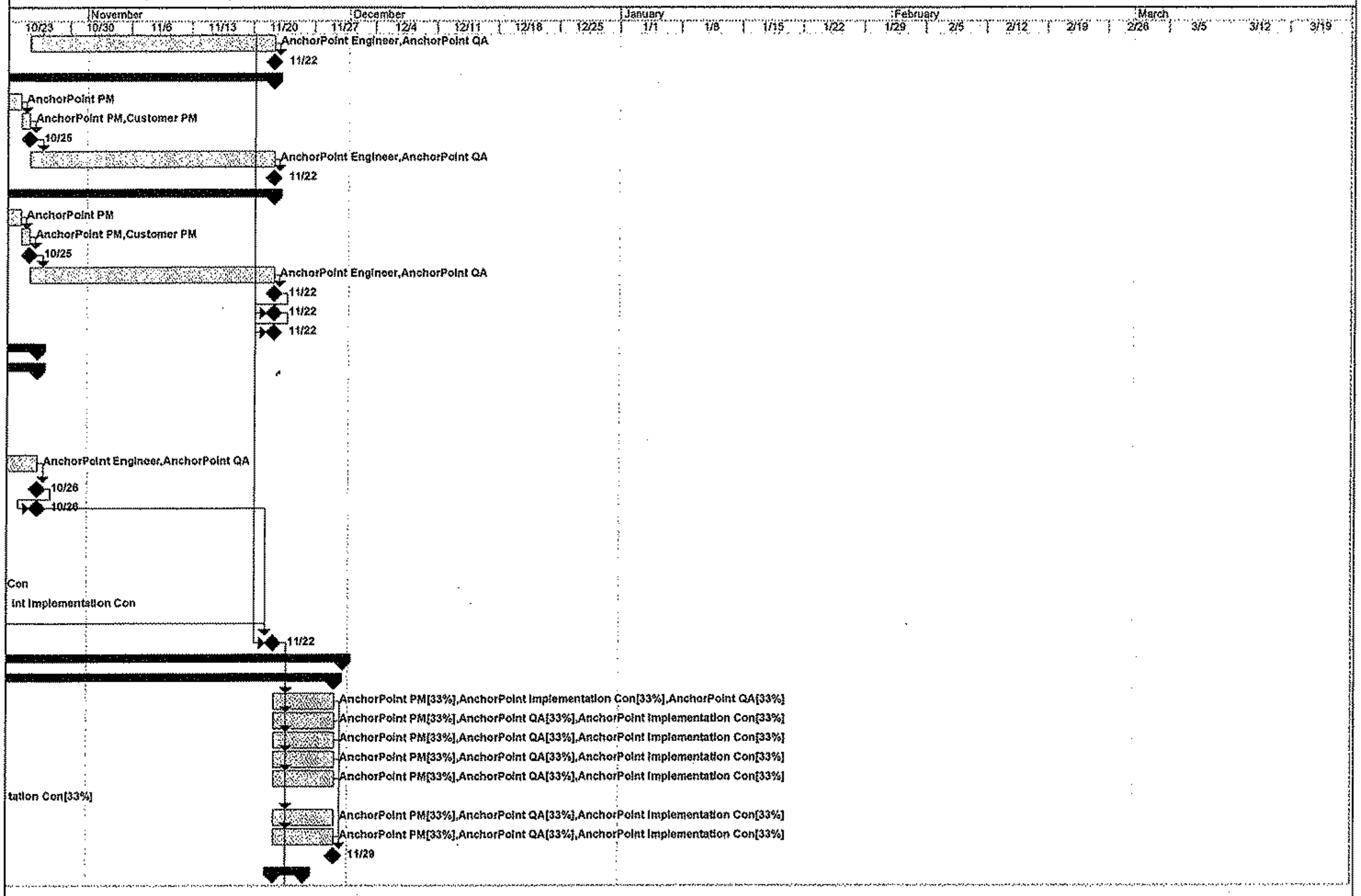
|---|---|---|---|---|---|---|---|---|---|---|
| | Split | | Milestone | | Project Summary | | External Milestone | | | |

AnchorPoint Draft TEM Implementation Project Plan V3.0

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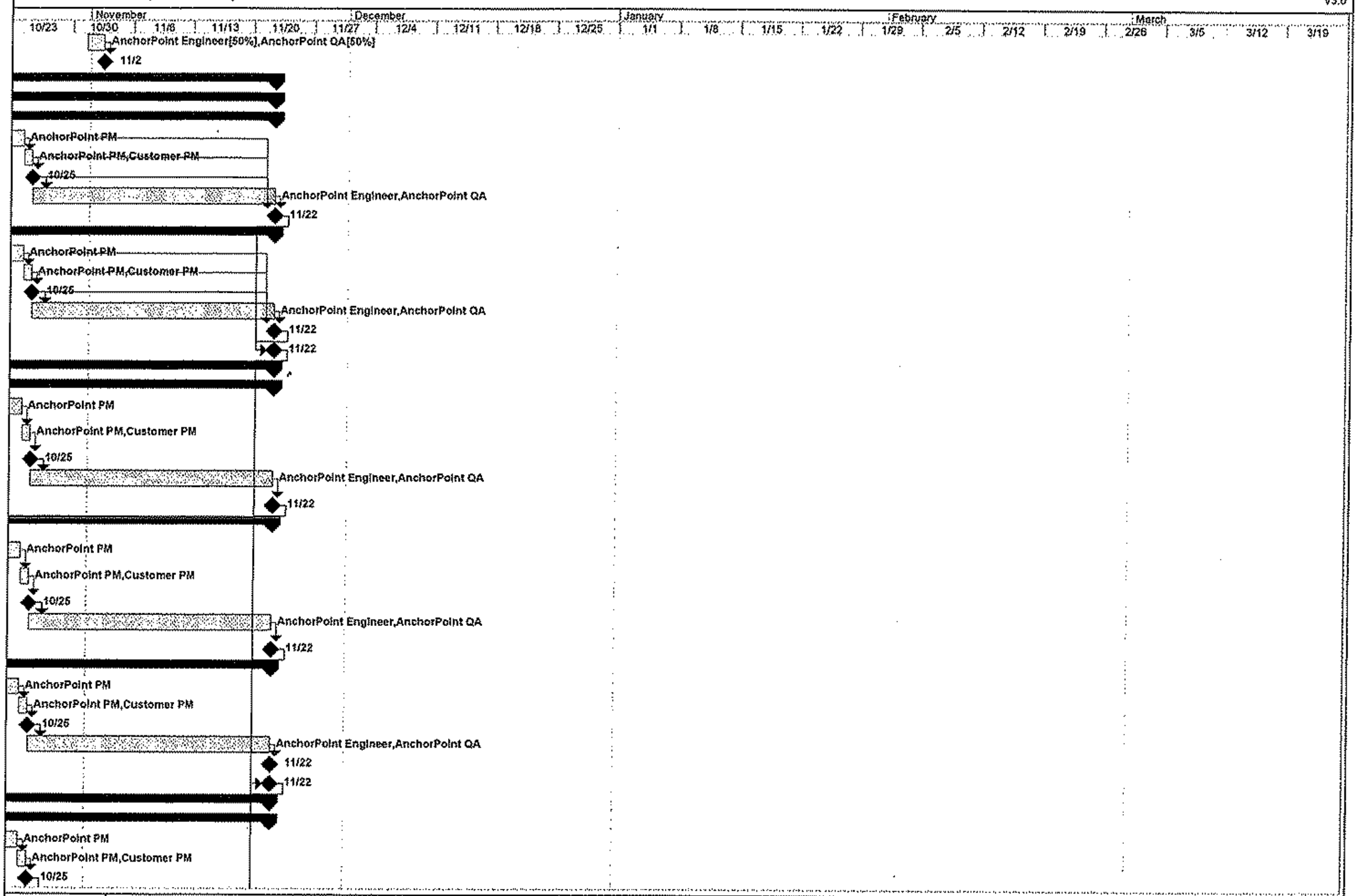
|---|---|---|---|---|---|---|---|---|---|
| Project: Prospect Implementation Pr Date: Fri 9/23/05 | Task | | Progress | | Summary | | External Tasks | | Deadline |
| | Split | | Milestone | | Project Summary | | External Milestone | | |

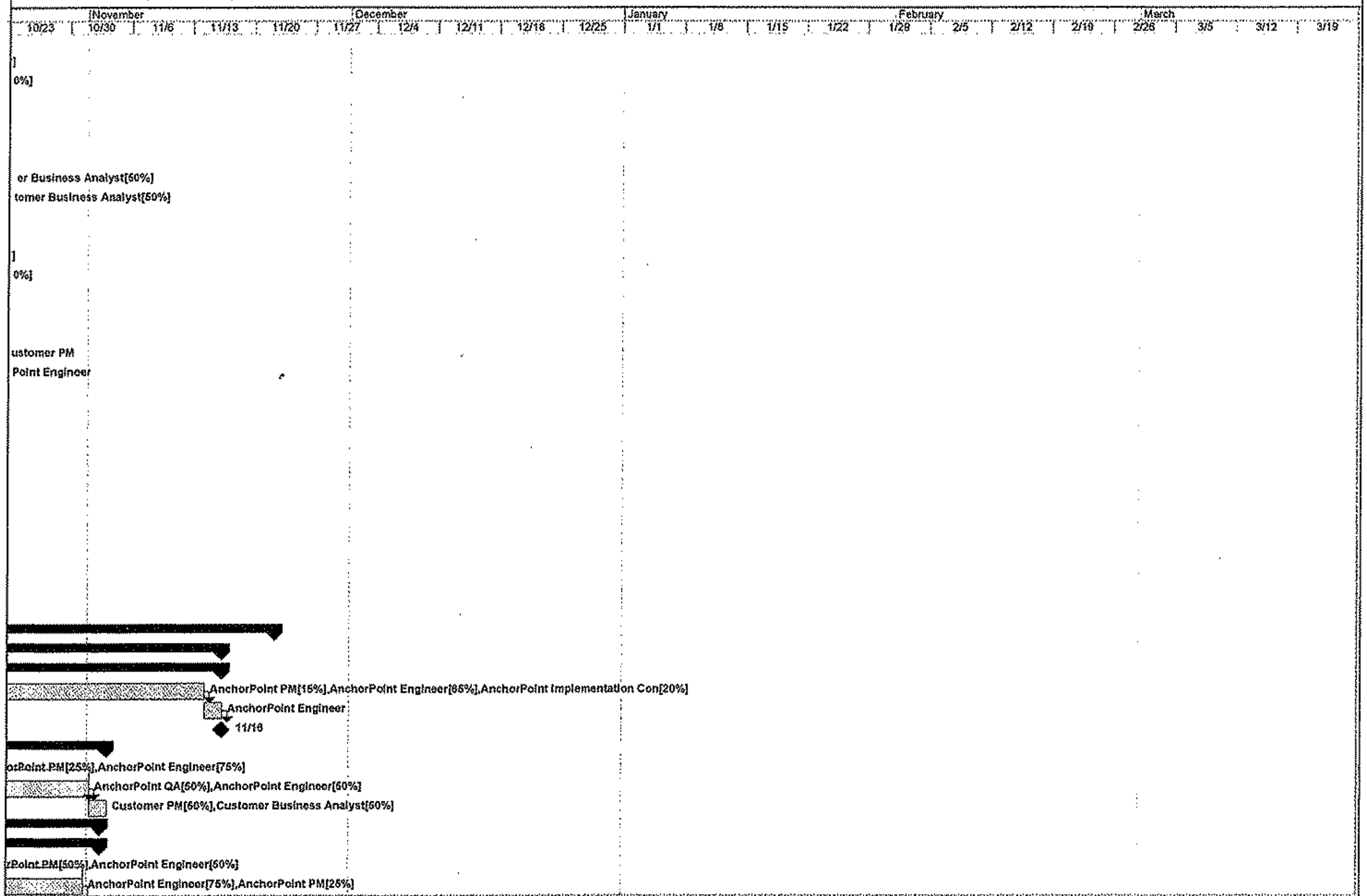
AnchorPoint Draft TEM Implementation Project Plan

V3.0




Project: Prospect Implementation Pr
Date: Fri 9/23/05

| Task | Progress | Summary | External Tasks | Deadline |
|---|---|---|---|---|
| Split | Milestone | Project Summary | External Milestone | |

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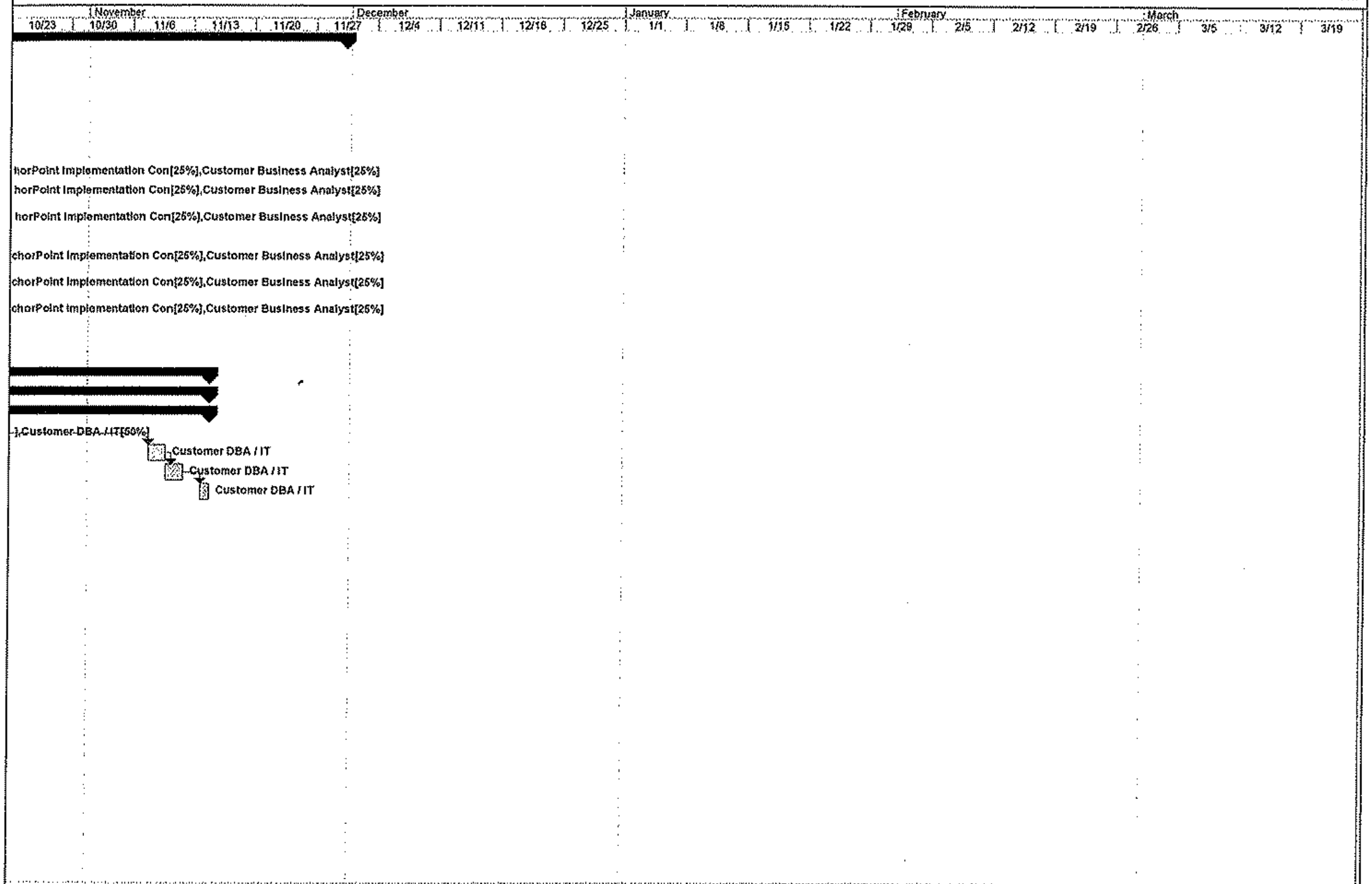
|---|---|---|---|---|---|---|---|---|
| Project: Prospect Implementation Pr<br>Date: Fri 9/23/05 | Task | | Progress | | Summary | | External Tasks | | Deadline |
| | Split | | Milestone | | Project Summary | | External Milestone | |




Project: Prospect Implementation Pr
Date: Fri 9/23/05

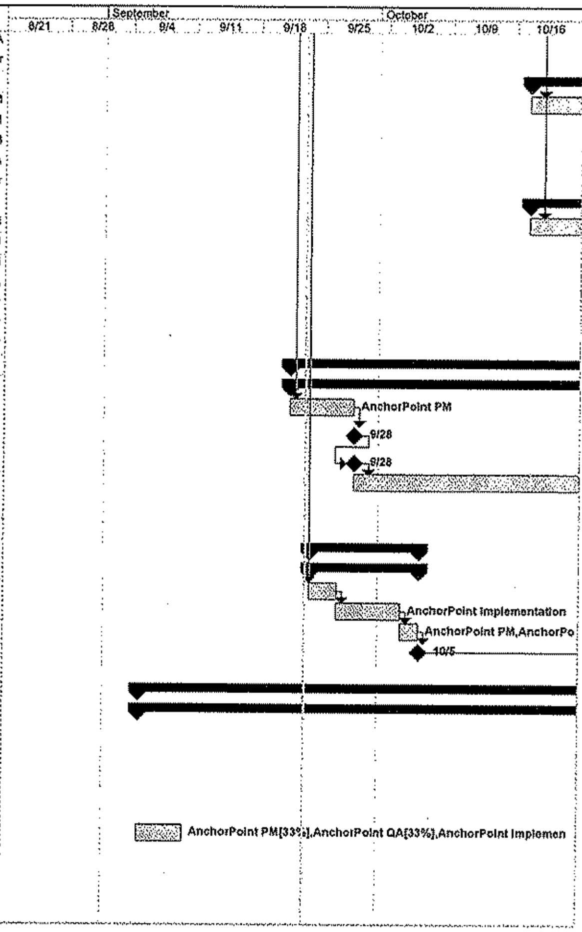
| | | | | |
|---|---|---|---|---|
| Task | Progress | Summary | External Tasks | Deadline |
| Split | Milestone | Project Summary | External Milestone | |

| ID | Task Name | Resource Names |
|---|---|---|
| 167 | AnchorPoint installed in UAT | AnchorPoint Implementation Con |
| 168 | Install components in UAT | AnchorPoint Implementation Con |
| 169 | **Implementation Walkthrough** | |
| 170 | Implementation Walkthrough with <<CUSTOMER>> | AnchorPoint PM,Customer PM |
| 171 | Validate installation in UAT | AnchorPoint PM,Customer PM[30%],Customer Business Analyst[55%] |
| 172 | Validate Electronic Invoices in UAT | AnchorPoint PM[15%],Customer PM[30%],Customer Business Analyst[55%] |
| 173 | Validate GL output | AnchorPoint PM[15%],Customer PM[30%],Customer Business Analyst[55%] |
| 174 | **User Acceptance Testing Phase Sign-off** | |
| 175 | UAT Sign-Off by <<CUSTOMER>> | Customer PM |
| 176 | UAT Sign-Off by AnchorPoint | AnchorPoint PM |
| 177 | **Delivery Phase** | |
| 178 | **Production Delivery** | |
| 179 | AnchorPoint Installed in Production | AnchorPoint PM,AnchorPoint Implementation Con[15%],Customer PM[25%],Customer DBA / |
| 180 | Validate installation in Production | AnchorPoint PM[10%],AnchorPoint Implementation Con[15%],Customer PM[25%],Customer DBA / |
| 181 | Production Delivery Sign-Off | AnchorPoint PM,Customer PM |
| 182 | **Training** | |
| 183 | Perform training at <<CUSTOMER>> | AnchorPoint Implementation Con,Customer Business Analyst |
| 184 | Training Sign-Off | AnchorPoint PM,Customer PM |
| 185 | Delivery Phase Sign-Off | AnchorPoint PM,Customer PM |
| 186 | **Go-Live** | |
| 187 | Go-Live | AnchorPoint PM,Customer PM |
| 188 | Go Live Sign-Off | AnchorPoint PM,Customer PM |

September: 8/21 8/28 9/4 9/11 9/18 9/25
October: 10/2 10/9 10/16

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Project: Prospect Implementation Pr Date: Fri 9/23/05 | Task | | Progress | | Summary | | External Tasks | | Deadline |
| | Split | | Milestone | | Project Summary | | External Milestone | | |

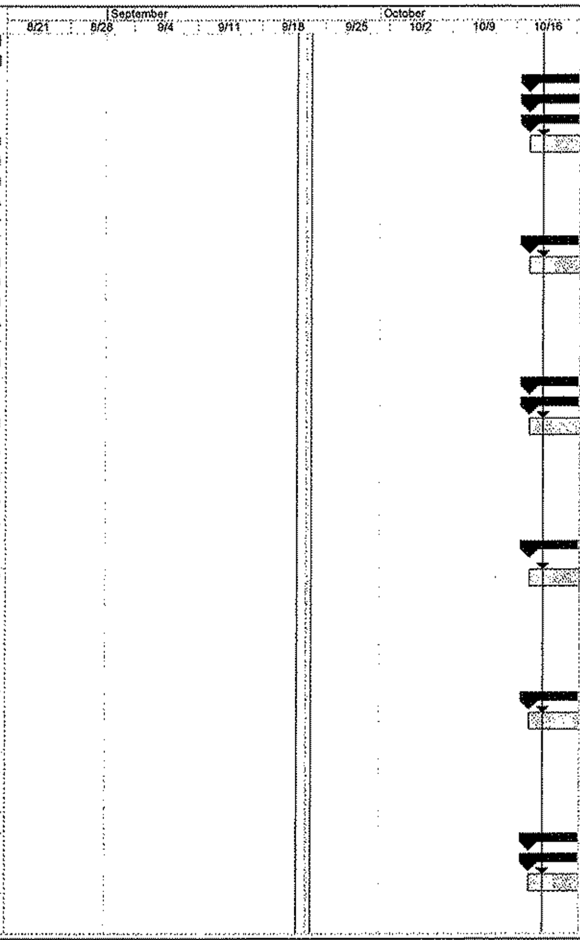
| ID | Task Name | Resource Names |
|---|---|---|
| 124 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 125 | Vendor A Electronic Data Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 126 | **Vendor B Electronic Data Invoice Import** | |
| 127 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 128 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 129 | Submit Specifications for Development | AnchorPoint PM |
| 130 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 131 | Vendor B Electronic Data Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 132 | **Vendor C Paper Data Invoices** | |
| 133 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 134 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 135 | Submit Specifications for Development | AnchorPoint PM |
| 136 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 137 | Vendor C Paper Data Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 138 | Data Invoices Completed | AnchorPoint PM,AnchorPoint Engineer |
| 139 | Invoice Development Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 140 | **Interfaces** | |
| 141 | **GL Interface** | |
| 142 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 143 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 144 | Submit Specifications for Development | AnchorPoint PM |
| 145 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 146 | GL Interface Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 147 | Interface Development Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 148 | **Call Collection Units (CCU)** | |
| 149 | **Bring CCUs Online** | |
| 150 | Customer Receives CCU | |
| 151 | Setup CCU to begin collecting | AnchorPoint Implementation Con |
| 152 | Gather polled records for evaluation, testing | AnchorPoint PM,AnchorPoint Implementation Con |
| 153 | CCU Install Sign-off | AnchorPoint PM |
| 154 | Development Phase Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 155 | **Testing Phase** | |
| 156 | **AnchorPoint Integrated Testing** | |
| 157 | Interface testing | rPoint Implementation Con[33%],AnchorPoint QA[33%] |
| 158 | Service Order Management testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 159 | Invoice Management testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 160 | Usage Management testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 161 | Asset Management testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 162 | Rate Table testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 163 | Business Analytics testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 164 | CCU Testing | rPoint QA[33%],AnchorPoint Implementation Con[33%] |
| 165 | Full Testing Sign-Off by AnchorPoint | AnchorPoint PM,AnchorPoint QA |
| 166 | **User Acceptance Testing (UAT) by <<CUSTOMER>>** | |




| | | | | |
|---|---|---|---|---|
| Project: Prospect Implementation Pr Date: Fri 9/23/05 | Task | Progress | Summary | External Tasks | 
| | Split | Milestone | Project Summary | External Milestone |

Deadline

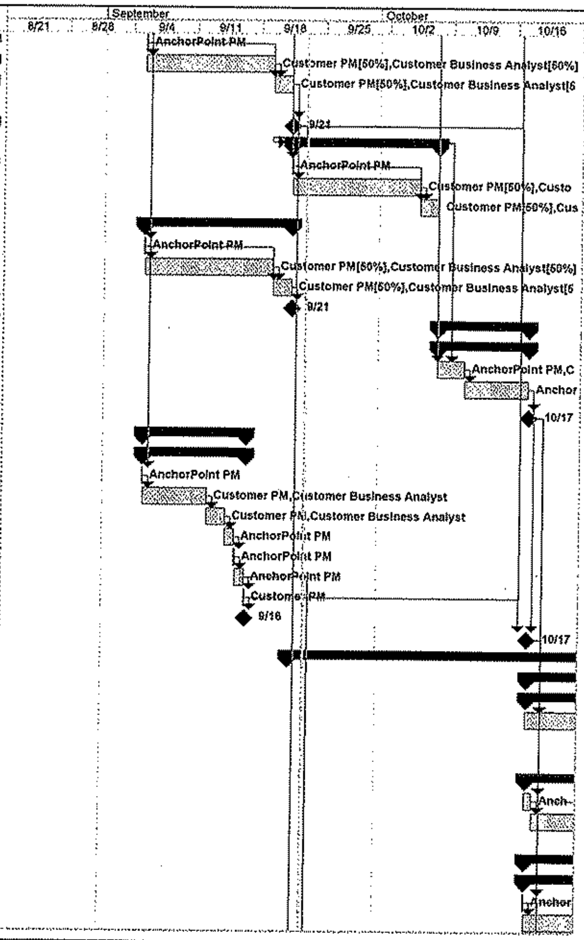
| ID | Task Name | Resource Names |
|---|---|---|
| 82 | Unit test new dashboards | AnchorPoint Engineer[50%],AnchorPoint QA[50%] |
| 83 | BA Sign-off | AnchorPoint PM[50%],Customer PM[50%] |
| 84 | Invoices | |
| 85 | Wireless Invoices | |
| 86 | Vendor A Electronic Wireless Invoices | |
| 87 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 88 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 89 | Submit Specifications for Development | AnchorPoint PM |
| 90 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 91 | Vendor A Electronic Wireless Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 92 | Vendor B Paper Wireless Invoices | |
| 93 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 94 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 95 | Submit Specifications for Development | AnchorPoint PM |
| 96 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 97 | Vendor B Paper Wireless Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 98 | Wireless Invoices Completed | AnchorPoint PM |
| 99 | Voice Invoices | |
| 100 | Vendor A Electronic Voice Invoice Import | |
| 101 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 102 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 103 | Submit Specifications for Development | AnchorPoint PM |
| 104 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 105 | Vendor A Electronic Voice Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 106 | Vendor B Electronic Voice Invoice Import | |
| 107 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 108 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 109 | Submit Specifications for Development | AnchorPoint PM |
| 110 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 111 | Vendor B Electronic Voice Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 112 | Vendor C Paper Invoices | |
| 113 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 114 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 115 | Submit Specifications for Development | AnchorPoint PM |
| 116 | Development and QA | AnchorPoint Engineer,AnchorPoint QA |
| 117 | Vendor C Paper Invoice Sign-off | AnchorPoint PM,AnchorPoint Engineer |
| 118 | Voice Invoices Completed | AnchorPoint PM |
| 119 | Data Invoices | |
| 120 | Vendor A Electronic Data Invoice Import | |
| 121 | Functional Specifications Provided to <<CUSTOMER>> | AnchorPoint PM |
| 122 | Sign off on specifications | AnchorPoint PM,Customer PM |
| 123 | Submit Specifications for Development | AnchorPoint PM |




Project: Prospect Implementation Pr
Date: Fri 9/23/05

Task · Progress · Summary · External Tasks · Deadline
Split · Milestone · Project Summary · External Milestone

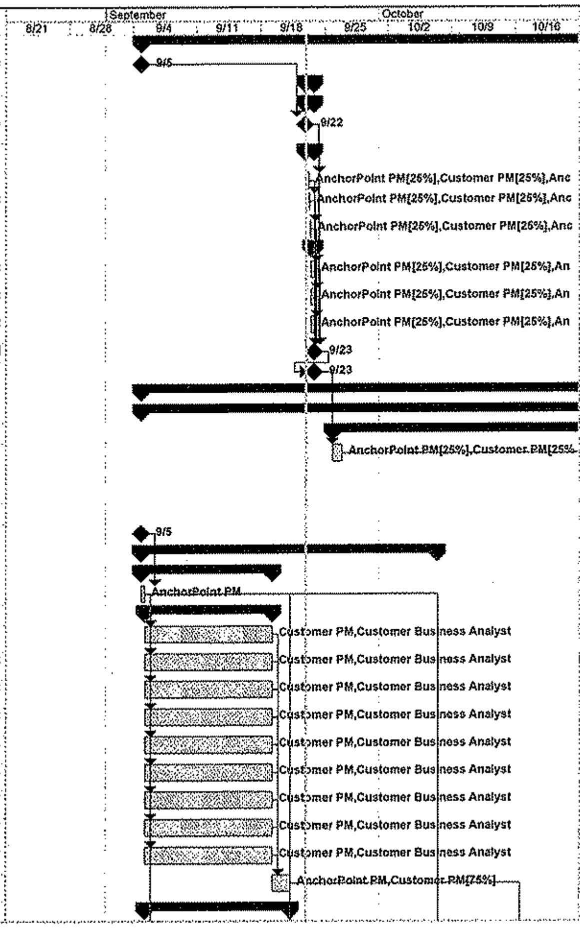
| ID | Task Name | Resource Names |
|---|---|---|
| 39 | Provide GL Interface Specs & Sample File | AnchorPoint PM |
| 40 | Provide GL Interface Sample File | Customer PM[50%],Customer Business Analyst[50%] |
| 41 | Collect GAP data between integration points and AnchorPoint APIs | Customer PM[50%],Customer Business Analyst[50%] |
| 42 | Interfaces Sign-off | AnchorPoint PM[50%],Customer PM[50%] |
| 43 | Rate Tables | |
| 44 | Provide Sample File | AnchorPoint PM |
| 45 | Collect Rate Table Data | Customer PM[50%],Customer Business Analyst[50%] |
| 46 | Rate Table Sign-off | Customer PM[50%],Customer Business Analyst[50%] |
| 47 | Business Analytics | |
| 48 | Provide Sample Dashboards | AnchorPoint PM |
| 49 | Determine any <<CUSTOMER>> specific needs | Customer PM[50%],Customer Business Analyst[50%] |
| 50 | Collect GAP between custom needs and standard dashboards | Customer PM[50%],Customer Business Analyst[50%] |
| 51 | BA Sign-off | AnchorPoint PM[50%],Customer PM[50%] |
| 52 | Database Preparation | |
| 53 | Database Load Template | |
| 54 | Receive finished Database Load templates | AnchorPoint PM,Customer PM |
| 55 | DB Template information Validation/Review | AnchorPoint Engineer |
| 56 | Database Preparation Sign-off | AnchorPoint PM |
| 57 | Call Collection Units (CCU) | |
| 58 | Gather information | |
| 59 | Deliver CCU Site information worksheets to Customer | AnchorPoint PM |
| 60 | Gather CCU Site information | Customer PM,Customer Business Analyst |
| 61 | Fill in CCU Site worksheets | Customer PM,Customer Business Analyst |
| 62 | Receive CCU Site information from Customer | AnchorPoint PM |
| 63 | Order CCU | AnchorPoint PM |
| 64 | Ship CCU | AnchorPoint PM |
| 65 | Schedule CCU setup with AnchorPoint | Customer PM |
| 66 | CCU Sign-off | AnchorPoint PM,Customer PM |
| 67 | Design Phase Sign-off | AnchorPoint PM |
| 68 | Development Phase | |
| 69 | Database Building | |
| 70 | Database Load | |
| 71 | Build customer Database | Engineer[65%],AnchorPoint Implementation Con[20%] |
| 72 | DB Load Validation/Review | AnchorPoint Engineer |
| 73 | Database Load Sign-off | AnchorPoint PM |
| 74 | Rate Tables | |
| 75 | Develop rate tables | AnchorPoint PM[25%],AnchorPoint Engineer[75%] |
| 76 | Unit test rate tables | AnchorPoint QA[50%],AnchorPoint Engineer[50%] |
| 77 | Rate Table Sign-off | Customer PM[50%],Customer Business Analyst[50%] |
| 78 | Reports | |
| 79 | Business Analytics | |
| 80 | Layout new dashboards | AnchorPoint PM[50%],AnchorPoint Engineer[50%] |
| 81 | Develop new dashboards | AnchorPoint Engineer[75%],AnchorPoint PM[25%] |




Project: Prospect Implementation Pr
Date: Fri 9/23/05

| Task | Progress | Summary | External Tasks | Deadline |
|---|---|---|---|---|
| Split | Milestone | Project Summary | External Milestone | |

| ID | Task Name | Resource Names |
|---|---|---|
| 1 | <<CUSTOMER>> AnchorPoint TEM Implementation Plan | |
| 2 | Contract Signing Date | AnchorPoint PM,Customer PM |
| 3 | Scoping & Planning Phase | |
| 4 | Project Kick-Off | |
| 5 | Schedule Kick-Off meeting with <<CUSTOMER>> | AnchorPoint PM,Customer PM |
| 6 | Hold Kick-Off Meeting | |
| 7 | Review Statement of Work (SOW) | ımentation Con[25%],Customer Business Analyst[25%] |
| 8 | Implementation Questions/Needs | AnchorPoint PM[25%],Customer PM[25%],AnchorPoint Implementation Con[25%],Customer Business |
| 9 | <<CUSTOMER>> Questions/Needs | ımentation Con[25%],Customer Business Analyst[25%] |
| 10 | Review Baseline Project Plan | |
| 11 | Identify Critical Milestones | AnchorPoint PM[25%],Customer PM[25%],AnchorPoint Implementation Con[25%],Customer Business |
| 12 | Identify Project Resources | AnchorPoint PM[25%],Customer PM[25%],AnchorPoint Implementation Con[25%],Customer Business |
| 13 | Identify Deliverables and Expected Participation | AnchorPoint PM[25%],Customer PM[25%],AnchorPoint Implementation Con[25%],Customer Business |
| 14 | Kick-off Meeting Sign-off | AnchorPoint PM[50%],Customer PM[50%] |
| 15 | Scoping & Planning Phase Sign-Off | AnchorPoint PM,Customer PM |
| 16 | Design Phase | |
| 17 | Environment Preparation | |
| 18 | Server | |
| 19 | Order/Designate hardware for <<CUSTOMER>> | PM[25%],Customer PM[25%],Customer DBA / IT[50%] |
| 20 | Setup server hardware | Customer DBA / IT |
| 21 | Install MS SQL 2000 on server | Customer DBA / IT |
| 22 | Test server hardware | Customer DBA / IT |
| 23 | Environment Prep Phase Sign-Off | AnchorPoint PM,Customer PM |
| 24 | <<CUSTOMER>> Information Gathering | |
| 25 | Database Load Info | |
| 26 | Deliver Database Load templates to Customer | AnchorPoint PM |
| 27 | Gather data for Database Load templates | |
| 28 | Organizations (Cost Centers, Departments) for chargeback of invoices, if applicable | Customer PM,Customer Business Analyst |
| 29 | Circuits | Customer PM,Customer Business Analyst |
| 30 | Circuit Contract Rates | Customer PM,Customer Business Analyst |
| 31 | Connectors | Customer PM,Customer Business Analyst |
| 32 | Connector Contract Rates | Customer PM,Customer Business Analyst |
| 33 | Vendor Remittence Information | Customer PM,Customer Business Analyst |
| 34 | Frame Ports / PVCs | Customer PM,Customer Business Analyst |
| 35 | Extensions (incl. Cell Phone #s or telephone lines for CDR) | Customer PM,Customer Business Analyst |
| 36 | Calling Cards | Customer PM,Customer Business Analyst |
| 37 | Review collected data for validity, accuracy | AnchorPoint PM,Customer PM[75%] |
| 38 | Interfaces | |




Project: Prospect Implementation Pr
Date: Fri 9/23/05

Task | Progress | Summary | External Tasks | Deadline
Split | Milestone | Project Summary | External Milestone

Rev. 09/08

## State of West Virginia

# VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with ***West Virginia Code***, §5A-3-37. (Does not apply to construction contracts). ***West Virginia Code***, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the ***West Virginia Code***. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1\. **Application is made for 2.5% resident vendor preference for the reason checked:**

____ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

____ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

____ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or,**

2\. **Application is made for 2.5% resident vendor preference for the reason checked:**

____ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

3\. **Application is made for 2.5% resident vendor preference for the reason checked:**

____ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

4\. **Application is made for 5% resident vendor preference for the reason checked:**

____ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or,**

5\. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**

____ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or,**

6\. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**

____ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

**Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.**

Bidder: AnchorPoint A Division of MTS Signed: Shauna Heydecker

Date: 10-5-09 Title: Sales Manager

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.*

RFQ No. ______________

STATE OF WEST VIRGINIA
Purchasing Division

# PURCHASING AFFIDAVIT

**VENDOR OWING A DEBT TO THE STATE:**
***West Virginia Code*** §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

**PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:**
If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the ***West Virginia Code***. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the ***West Virginia Code*** and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the ***West Virginia Code*** may take place before their work on the public improvement is begun.

**ANTITRUST:**
In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the state of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

**LICENSING:**
Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

**CONFIDENTIALITY:**
The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf.

Under penalty of law for false swearing (***West Virginia Code*** §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

Vendor's Name: AnchorPoint A Division of MTS

Authorized Signature: Shauna Heydecker Date: 10-5-2009