Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Proposals
Service - Prof

09/15/21 09:55:04
WV Purchasing Division

Proc Folder: 887002			**Reason for Modification:**
Doc Description: Addendum No 2 - FLEET MANAGEMENT SYSTEM			Addendum No. 2
Proc Type: Central Master Agreement			
Date Issued	**Solicitation Closes**	**Solicitation No**	**Version**
2021-09-03	2021-09-16 13:30	CRFP 0803 DOT2200000001	3

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code:

Vendor Name : Infor Public Sector, Inc.

Address :

Street : 13560 Morris Road, Suite 4100

City : Alpharetta

State : GA **Country :** USA **Zip :** 30004

Principal Contact : Lindsay Pritchard

Vendor Contact Phone: 651-767-7000 **Extension:**

FOR INFORMATION CONTACT THE BUYER
Tara Lyle
(304) 558-2544
tara.l.lyle@wv.gov

Vendor Signature X **FEIN#** 94-2913642 **DATE** 9/13/21

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

ADDENDUM NO. 2

1. Responses to vendor questions attached.
2. To extend the bid opening from 09/09/2021 to 09/16/2021 at 1:30 pm.
3. Attachments A and B have been revised and attached to unlock some protected fields in the previous attachments.

ONLINE RESPONSES FOR THIS SOLICITATION ARE PROHIBITED Please see Section 6 entitled BID SUBMISSION for more information.

No other changes.

INVOICE TO	SHIP TO
DIVISION OF HIGHWAYS OFFICE OF THE SECRETARY 1900 KANAWHA BLVD E, BLDG 5 RM A109 CHARLESTON WV 25305-0440 US	DIVISION OF HIGHWAYS EXECUTIVE DIVISION 1900 KANAWHA BLVD E, BLDG 5 CHARLESTON WV 25305-0430 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	DEVELOPMENT IMPLEMENTATION SUPPORT FLEET MGT SYSTEM				

Comm Code	Manufacturer	Specification	Model #
43233701			

Extended Description:
SOFTWARE DEVELOPMENT, INSTALLATION, SUPPORT AND TRAINING

Attachments A and B revised on Addendum No. 2 issued 9/3/2021

SEE ATTACHMENTS.

SCHEDULE OF EVENTS

Line	Event	Event Date

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, 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: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (*W. Va. Code* §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Infor Public Sector, Inc.

Authorized Signature: [signature] Date: 9/13/21

State of Minnesota

County of Hennepin, to-wit:

Taken, subscribed, and sworn to before me this 13 day of September, 2021.

My Commission expires January 31, 2026.

AFFIX SEAL HERE

ELIZABETH A HAMMETT
NOTARY PUBLIC - MINNESOTA
MY COMMISSION EXPIRES 01/31/2026

NOTARY PUBLIC Elizabeth A. Hammett

West Virginia Ethics Commission

Disclosure of Interested Parties to Contracts

Pursuant to *W. Va. Code* § 6D-1-2, a state agency may not enter into a contract, or a series of related contracts, that has/have an actual or estimated value of $1 million or more until the business entity submits to the contracting state agency a Disclosure of Interested Parties to the applicable contract. In addition, the business entity awarded a contract is obligated to submit a supplemental Disclosure of Interested Parties reflecting any new or differing interested parties to the contract within 30 days following the completion or termination of the applicable contract.

For purposes of complying with these requirements, the following definitions apply:

"Business entity" means any entity recognized by law through which business is conducted, including a sole proprietorship, partnership or corporation, but does not include publicly traded companies listed on a national or international stock exchange.

"Interested party" or *"Interested parties"* means:

(1) A business entity performing work or service pursuant to, or in furtherance of, the applicable contract, including specifically sub-contractors;
(2) the person(s) who have an ownership interest equal to or greater than 25% in the business entity performing work or service pursuant to, or in furtherance of, the applicable contract. (This subdivision does not apply to a publicly traded company); and
(3) the person or business entity, if any, that served as a compensated broker or intermediary to actively facilitate the applicable contract or negotiated the terms of the applicable contract with the state agency. (This subdivision does not apply to persons or business entities performing legal services related to the negotiation or drafting of the applicable contract.)

"State agency" means a board, commission, office, department or other agency in the executive, judicial or legislative branch of state government, including publicly funded institutions of higher education: Provided, that for purposes of W. Va. Code § 6D-1-2, the West Virginia Investment Management Board shall not be deemed a state agency nor subject to the requirements of that provision.

The contracting business entity must complete this form and submit it to the contracting state agency prior to contract award and to complete another form within 30 days of contract completion or termination.

This form was created by the State of West Virginia Ethics Commission, 210 Brooks Street, Suite 300, Charleston, WV 25301-1804. Telephone: (304)558-0664; fax: (304)558-2169; e-mail: ethics@wv.gov; website: www.ethics.wv.gov.

Revised June 8, 2018

West Virginia Ethics Commission

Disclosure of Interested Parties to Contracts

(Required by *W. Va. Code* § 6D-1-2)

Name of Contracting Business Entity: Infor Public Sector, Inc. **Address:** 13560 Morris Road, Suite 4100 Alpharetta, GA 30004

Name of Authorized Agent: Lindsay Pritchard **Address:** 380 St. Peter Street, St. Paul, MN 55102

Contract Number: CRFP 0803 DOT2200000001 **Contract Description:** FLEET MANAGEMENT SYSTEM

Governmental agency awarding contract: DIVISION OF HIGHWAYS

☐ **Check here if this is a Supplemental Disclosure**

List the Names of Interested Parties to the contract which are known or reasonably anticipated by the contracting business entity for each category below *(attach additional pages if necessary)*:

1. **Subcontractors or other entities performing work or service under the Contract**
   ☒ Check here if none, otherwise list entity/individual names below.

2. **Any person or entity who owns 25% or more of contracting entity (not applicable to publicly traded entities)**
   ☐ Check here if none, otherwise list entity/individual names below.
   Infor Public Sector, Inc. is 100% owned by Infor, Inc.

3. **Any person or entity that facilitated, or negotiated the terms of, the applicable contract (excluding legal services related to the negotiation or drafting of the applicable contract)**
   ☒ Check here if none, otherwise list entity/individual names below.

Signature: [signature] Date Signed: 9/13/21

Notary Verification

State of Minnesota, County of Hennepin:

I, Lindsay Pritchard, the authorized agent of the contracting business entity listed above, being duly sworn, acknowledge that the Disclosure herein is being made under oath and under the penalty of perjury.

Taken, sworn to and subscribed before me this 13th day of September, 2021.

Elizabeth A. Hammett
Notary Public's Signature

To be completed by State Agency:
Date Received by State Agency: _____
Date submitted to Ethics Commission: _____
Governmental agency submitting Disclosure: _____

ELIZABETH A HAMMETT
NOTARY PUBLIC - MINNESOTA
MY COMMISSION EXPIRES 01/31/2026

Infor Response to the West Virginia Department of Transportation for a Fleet Management System

Closing Date: Thursday, September 9, 2021

Submitted by:
Tim Shea
Account Manager
561-460-8366
t.shea@infor.com
Infor Public Sector, Inc.

Infor Response to the West Virginia Department of Transportation for a Fleet Management System

Closing Date: Thursday, September 9, 2021

Submitted by:
Tim Shea
Account Manager
561-460-8366
t.shea@infor.com
Infor Public Sector, Inc.

Infor Statement of Confidentiality and Intent

This response document and the responses and information contained herein (collectively, "Infor Confidential Information") are the confidential and proprietary information of Infor, Inc. and/or its affiliates ("Infor") and thus, must not be shared with any third party or reproduced in any form without Infor's express written consent. Notwithstanding the foregoing, a reasonable number of copies may be made for recipients' internal evaluation purposes only. The Infor Confidential Information is subject to the confidentiality agreement (or similar agreement) between the West Virginia Department of Transportation and Infor.

Infor does not warrant that the material contained in this document is error-free and, therefore, is subject to change without notice. If you find any problems with this document, please report them immediately to Infor in writing.

Where Infor has described features or functionality that it anticipates will be included in future releases, Infor is not making a contractual offer to provide the features or functionality. Any description of future features or functionality and any statements regarding anticipated timing of their availability are estimates only. Infor does not make contractual commitments regarding timing or delivery of features or functionality that are not currently available. Infor ascribes no value to such features or functionality, as it is not committing to deliver them.

Please note that this proposal is based upon our current, initial understanding of your business. Our response has not been drafted as a legal document and, as such, should not be construed as constituting a binding contractual commitment. We would be pleased to meet with knowledgeable representatives of the West Virginia Department of Transportation for the purposes of further defining your requirements and entering into binding contracts between our organizations for the licensing and implementation of Infor software.

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641 Avenue of the Americas
New York, NY 10011
800-260-2640
infor.com

Transmittal Letter

Thursday, September 9, 2021

West Virginia Department of Transportation
Attn: Tara Lyle
2019 Washington STE
Charleston, WV 25305

Dear Ms. Lyle,

Infor Public Sector, Inc. (Infor) appreciates the opportunity to offer this Request for Proposal (RFP) response to assist the West Virginia Department of Transportation (WVDOT) in evaluating a Fleet Management Solution. Infor understands the importance of this initiative for the West Virginia DOT, and we believe our response will help to identify a clear path for meeting the objectives stated in the RFP.

Infor has more than 30 years of experience in enterprise asset management (EAM), and Infor EAM Fleet Management has a proven track record for delivering innovation and value to leading companies managing fleets. This best-in-class, feature-rich asset and maintenance component makes it easier to process warranty claims, and better manage tires and fuels. Vehicle performance also improves through more comprehensive maintenance.

Infor provides a comprehensive EAM solution with the highest priority placed on optimizing the lifecycle of assets and the resources supporting them. We recognize that it is imperative to provide innovative business solutions and core enterprise technologies to meet the critical needs of the business. Our services encompass all phases of implementation including: Business Requirements Development, System Integration, Project Management, Solution Configuration, Data Migration, Maintenance and Support; Testing and Acceptance; Inventory and Barcoding; and Training and Knowledge Transfer. Moreover, our experience includes Vertical and Linear Asset Management, GIS/Spatial integrations, mobile deployments, integrations to key business applications, and Organizational Change Management.

We realize the West Virginia DOT wants to partner with a company that focuses specifically on the Public Sector and understand the unique challenges you face. Infor EAM has been used by the General Services Division of West Virginia Department of Administration for over 15 years. Infor is currently working with the Department of Administration on establishing updated contracts that will enable the General Services Division to upgrade to the latest version of CloudSuite EAM. We believe these updated contracts, once executed, and the upgraded Infor EAM environment offers the WVDOT a unique opportunity. Infor EAM is designed to allow multiple organizations or departments to leverage a single EAM instance but operate as an independent organization meeting departmental requirements.

Infor will serve as the primary vendor for this project and appreciates the challenge of balancing financial sustainability with enhancing operational efficiency and improving customer experiences. Our dedicated team is committed to serving you the same way you strive to serve the public in a personal, responsive, and cost-effective fashion.

Hundreds of government entities throughout the United States and Canada look to Infor's integrated technology, expertise, and support to meet their specific operational needs. In addition, your users will welcome the modern look of our clean and simplified screens. Ease of use and a clean look, which helps accelerate and simplify user adoption, is inherent in our solution.

641 Avenue of the Americas
New York, NY 10011
800-260-2640
infor.com

Infor will provide all software and services for this project and, at this time, does not foresee involving any other software providers or subcontractors.

At this time, Infor knows of no interest, direct or indirect, which would conflict with the performance of services under a contract between Infor and the West Virginia Department of Transportation (WVDOT) and shall not employ, in the performance of a contract with WVDOT, any person having a conflict.

This entire proposal and the price contained therein is binding upon the Vendor in all respects for a period of 180 days from receipt of the BAFO (Best and Final Offer), or from submission if no BAFO is requested.

Infor is committed not only to helping the WVDOT efficiently manage it fleet assets and the assets managed by the General Services Division, but to the state of West Virginia as a whole. In 2019, Infor opened a new office in Charleston, West Virginia, to run cloud applications for U.S. Government Agencies at the federal, state, and local level.

On behalf of Infor, we look forward to working with you to introduce our integrated software solution. Ultimately, all the operational information that you track can give insights into how all facets of your organization are performing. From your inventory, to servicing, to fuel expenses, to your asset inventory, keeping track of all the data your organization produces will create a larger picture of how you can run your fleet more efficiently. We stand ready to address any questions or offer clarification during the course of your review.

Sincerely,

Tim Shea, Account Manager
561-460-8366
t.shea@infor.com
Infor Public Sector, Inc.

Lindsay Pritchard, Associate General Counsel
651-767-6240
Lindsay.pritchard@infor.com
Infor, Inc.

1-Executive Summary

Infor's Proposed Solution and Services

Infor proposes to provide the West Virginia DOT application software with a full complement of implementation, training, and post-implementation support services to meet West Virginia DOT's requirements.

Application Software

Infor has more than 30 years of experience in enterprise asset management (EAM), and Infor EAM Fleet Management has a proven track record for delivering innovation and value to leading companies and Public Sector organizations managing fleets. This best-in-class, feature-rich asset and maintenance component makes it easier to process warranty claims, and better manage tires and fuels. Vehicle performance also improves through more comprehensive maintenance.

Infor EAM is built on a platform based on the architecture of the internet; flexible, scalable, adaptable, and open. One application can be upgraded, replaced, or even fail without taking your entire network down. Information is accessible in real-time. And system maintenance is less costly and complex.

The Infor EAM Fleet Management solution proposed is a comprehensive, integrated suite of functionality designed to work seamlessly with not only its own branded modules, but those of your existing systems to support the enterprise. The modular architecture of the application components provides a "plug and play" application set that integrates smoothly, leverages a common "look and feel" user experience and integrates Infor and non-Infor application components in a manner that is both economical and easy to maintain. The Service Orient Architecture (SOA) design of Infor applications optimizes your flexibility to grow and expand your requirement set over the coming years while optimizing your choices and reducing the total cost of ownership (TCO).

Fleet Management can help the WVDOT to optimize the efficiency of its fleets, and to reap the benefits of greater fleet performance and lower downtime for increased productivity and savings. Fleet Management does this by helping organizations like yours reduce breakdowns, track repair histories, and create dependable management of asset warranties. It allows you to track vehicle maintenance, improve tire management, and track warranty information using these key features:

- **Vehicle maintenance reporting standards (VMRS)**—With the automatically populated VMRS standard codes provided by Fleet Management, you can accurately track your maintenance activities for all the vehicles in your fleet and profit from enhanced reporting.
- **Fuel management**—Handle on-site fuel inventory with greater ease and efficiency. On top of that, by integrating Fleet Management with fuel card management systems, you can also track your company's vehicles, fuel, oil, and other fluid.
- **Tire management**—Benefit from pinpoint tracking—capture data for each tire, such as ID, description, accrued cost, and work order history for each vehicle to better manage your tire assets. You can also track all casing through the re-treading process, crediting the unused portion of tire life to vehicle history.
- **Warranties**—Lower overall costs by immediately flagging warranty repairs for vehicle, component, or replacement parts, as well as any asset of a major subsystem when opening a work order. You'll also have the ability to automatically create a warranty claim to your supplier.

Implementation Services

Infor Services offers our customers more than 4,500 experienced professionals and implementation partners in more than 170 countries—a global network of proven domain experts with local presence and knowledge who are well-qualified to support the complete Infor offering of solutions and technologies. We back our network with the best-practices developed from years of experience, along with the tools and materials to maximize your return on investment.

Infor carefully plans, monitors, and executes project resourcing against our contractual obligations with our clients. We have resource managers and resourcing applications whose specific priority is to ensure each project is staffed with the highest skill level of consulting resource.
Infor's Project Manager will be 100% fully committed to the WVDOT Project from Start to Finish and will deploy the resources and skillsets needed effectively and efficiently to ensure 100% focus from those resources during their portion of the project for the WVDOT.

Infor Services offers a full range of business services and a global team of highly experienced professionals who can connect WVDOT to a wealth of Infor development and support resources. Our team can address your greatest challenges and opportunities with wide range of resources including:

- **Business Consulting:** World-class expertise for business analysis and assessment, solution design and implementation, enterprise performance monitoring, operation optimization and solution migration.
- **Implementation Accelerators:** Industry-specific solutions designed for rapid implementation and time to value.
- **Infor Education:** Training delivered by dedicated professionals for maximum workforce knowledge development.
- **Infor Solution Development:** Application framework enhancement including architecture, customization, integration, and migration development.
- **Infor Managed Services:** Day-to-day and long-term, single-point-of-contact for managing, enhancing, maintaining, and supporting custom and packaged software applications, including hosted application mode, Infor Application Management Services, and SaaS.
- **Infor Strategic Consulting:** Strategy and change management. Business process transformation.

Throughout all service lines, we ensure quality through structured service approaches and active project management. Infor's proprietary Implementation Methodology forms the framework for smooth, fast, and accurate implementations a proven, disciplined approach backed by knowledgeable, experienced people, and practical tools and processes.

Post-Implementation Technical Support

Infor offers support on a subscription basis or as a percentage of the license cost. There are 2 programs that are available so that you may choose what works best for your organization

Infor Premium Support: Provides support for an unlimited number of incidents, continuous online support through a portal that's available 24x7, telephone support, and priority queuing based on the severity of an incident.

Infor Premium Support has defined methodologies and key business systems that allow 24x7 interaction via the online Infor Support portal. Our extensive knowledge base system and recorded webinars are available at your convenience, in addition to extended critical incident support and live, interactive briefings.

Customer Success Plus Program: You may also choose the Customer Success Plus Program which has an assigned Customer Success Manager. The Customer Success Manager and the programs associated with this offering delivers dedicated, targeted support to help resolve issues and achieve user satisfaction with Infor's products and technology.

How Infor EAM Meets the Needs and Requirements of the West Virginia DOT

As a flagship solution for Infor, Infor EAM is a strategically targeted portfolio of solution for investment in market expansion, solution research & development, partner management, and inclusion in nearly all industry portfolios. With some of the largest transit, transportation and fleet management providers, Infor EAM is, and will remain, heavily focused on capabilities that surround asset and work

management issues facing Fleet, Transit, and Transportation organizations and agencies. To that end, Infor has most recently extended its already-robust capabilities to support thematic concepts that surround Asset Performance Management (APM), and advanced enterprise analytics, connectivity to key components using Infor Internet of Things (Infor IoT), Mobility via Infor EAM Mobile (phones, tablets, laptops, kiosks), critical points of integration (to Infor solutions as well as third parties), focus towards extreme solution usability, and continued expansions to scale into the future with deployment alternatives (SaaS, On-Prem, Hybrid), vertically specific implementation delivery methods, and critical vertical and geographical partnering.

To highlight some of these areas....

Strategically manage your Fleet with Asset Performance Management (APM)

Making wise decisions about how to keep all your assets performing well across the lifespan—so you can meet the expectations of your customers and constituents and grow your enterprise for future demands—necessitates more than break-fix, preventive, and predictive maintenance.

Increasingly, asset-intensive industries are developing Asset Performance Management (APM) capabilities that give them a data-supported window on their assets and an objective-aligned asset investment strategy. Infor EAM expands your ability to plan, manage, and optimize your entire asset portfolio, beyond the scope of vehicles as needed, to keep risks low and performance high.

What this means in many organizations is the ability to finally obtain true situational awareness...knowing where your assets are, what state of readiness that they are in, and what upcoming tasks should be considered. Infor, however, is bringing so much more. Infor is also bringing about opportunities to plan for the future by supporting methods of Capital Asset Planning, Asset Investment Planning, Risk Analysis, Predictive Maintenance supporting industry standards along the way, such as ISO 55000, ISO14224, State of Good Repair (SGR) and more. Through this added investment, it is Infor's direction to continue providing most all-encompassing solution on the market for Asset and Work Management.

Integrated Advanced Analytics

Developing a sound Asset Performance Management strategy depends on rich, reliable data that can be reported, visualized, and consumed by all your stakeholders. Our latest Infor CloudSuite EAM uses Infor Messaging to integrate with Data Lake, an Amazon Web Services-based cloud repository. Now, you can upload data from the fields you choose, at intervals you choose, so everyone from maintenance to engineering to capital investment can collaborate to make sure your assets keep performing at optimal service levels.

Our future direction is to continue to invest in the advancement and development of Infor EAM for Fleet as well as core EAM for other asset intensive industries. Most recently we have added Asset Performance Management and advanced enterprise analytics to the EAM portfolio, and we will continue to make advances in these areas. Our goal is to elevate EAM to a strategic solution for the entire enterprise through situational awareness and visibility of key assets to any organization.

Integration Where It Matters

Easily integrate Infor and third-party enterprise systems, while eliminating information silos with Infor Intelligent Open Network, Infor's advanced middleware cloud platform. Infor ION provides the flexibility you need to make an often-complex web of enterprise systems work together. It provides the long-term sustainability to optimize return on technology investments. With ION, one application can be upgraded, replaced, or even fail without taking the entire network down. Information is accessible in real-time, and system maintenance is less costly and complex.

For fleet, transportation, and transit providers, this means the ability to incorporate key data elements with ease such as those related to on-board diagnostics (telemetry), fuel management, fluid

management, tire management, calibration management, financial systems, human capital management systems, and more. Although Infor EAM's portfolio of capabilities most likely will meet and/or exceed most customer requirements by itself, it is important to know that as complexity grows, Infor will remain ready to receive any/all data related to the successful, safe, and cost-effective operation desires of any organization.

Finally, it is important to know that innovation is not accomplished in a vacuum. Vertical, solution, and product-oriented user groups are dedicated the success of any Infor application portfolio. As a strategic and flagship Infor portfolio, Infor EAM enjoys the opportunity to receive feedback from many Fleet, Transit and Transportation customer from around the world, to further the product, delivery, and deployment in the most effective way possible to support virtually every industry need. It is through these innovations, investments in continuous improvement, and direct feedback connections to the market which has made Infor EAM a market leader in the EAM space and will support that market position in the many years to come.

Infor's Approach to this Project

Infor has developed an approach to implementations using our deep business process focus and early alignment confirmation which allows our clients to:

- Achieve a solid value case,
- Accelerate timelines and improve ROI, and
- Deliver realistic and targeted business outcomes.

As outlined throughout our proposal, **a key differentiator** in our delivery is Infor Agility. The Agility approach produces these results by engaging early to identify those processes which are strategic and differentiating to your organization, confirming agreement on those classifications, and focusing our implementation efforts accordingly. Agility represents a fundamental departure from standard requirements-based implementation methodologies; The approach reduces or eliminates surprises during the project and presents a solid proven value case for the client's investment.

Figure 1.1. Infor Agility

What this means for WVDOT:

- **Engage:** The cornerstone of this stage is the Engage Workshop, Infor interacts with WVDOT to confirm the requirements, define the project strategy, and set the foundation for the project before the statement of work is completed this component of the project means both parties understand the engagement, requirements and how they are achieved by the product capabilities in more detail before the implementation is initiated.
- **Deploy:** The Infor Deployment Method will serve as the governing methodology for all deployment-related work for the project. Infor Deployment Method defines what is to be delivered from the project; who is responsible for that work; and how the work is performed. The allocation of time and resources is informed by our Engage Workshop so that substantial efficiencies are gained when contrasted with a traditional approach. Throughout the implementation, there will be a gradual transfer of knowledge and ownership from Infor to the WVDOT's project team until the members of the project team become the drivers and champions of the new system and business processes.
- **Achieve:** Immediately after Go-Live, the project team supports the end-user and IT organization as they take complete ownership of the system and roll-off the project team. During Achieve, the consulting team will facilitate continuity by involving the Infor Support Team, Customer Success Manager, and Account Executives as appropriate. Activities include transitioning to the post-go-live support model, documenting benefits realized, and opportunities for continuous improvement.
- **Evolve:** Throughout the customer lifecycle, WVDOT will have the support of the Infor's software and services teams in achieving its continuous improvement business objectives and planning for the future. We establish a platform of continuous improvement so you can take advantage of changing business conditions as well as technological advantages.

Infor's Successful Public Sector Implementations

Infor Services has significant experience providing EAM Fleet Management services to Public Sector clients similar to WVDOT. We have performed successful EAM implementations at hundreds of clients in North America alone, including Miami-Dade County, King County Department of Transportation, Chicago Transit Authority, the New York City MTA, New Jersey Turnpike, and the City of Greensboro. Infor provides Fleet management and Enterprise Asset management software to some large very large fleet customers including: Hertz, Frito Lay, Wayne Farms, First Transit, , and others.

Relevant Public Sector Experience and Qualifications of Key Staff

Our EAM implementation consultants are a full-service, self-contained business unit with all skillsets the project may require, from project governance and management to product configuration, integration, change management, all technical elements, and peripheral applications such as GIS, Mobile, and Barcoding. Combined, our consultants bring decades upon decades of experience working with EAM and our customers, and specifically in Public Sector and Transit-specific implementations We have provided our proposed staffing table later in this response as well as required Resumes in the Attachments Section.

Modified Terms and Justifications

Infor is pleased to provide its proposal but reserves the right to negotiate all legal terms and conditions in the RFP and any proposed contract if the West Virginia DOT (WVDOT) selects Infor for procurement.

Please note that Infor is proposing standard commercial software to meet the requirements as set forth in the RFP and Infor's proposal. As such, Infor's proposal is conditioned upon any resulting engagement being governed by (1) Infor's SaaS Agreement or Software License and Support Agreements, as applicable, and a Software Services Agreement or (2) the currently existing

negotiated contract between Infor and WVDOT that governs the software and services proposed. Copies of these agreements can be provided upon request.

Additional contract terms, or changes to contract terms that are required by applicable law, may be negotiated for inclusion in the final contract during contract negotiations. If chosen or shortlisted, Infor will work with WVDOT in good faith to reach an acceptable agreement.

2-Vendor Profile

Overview of Business Operations

Founded in 2002, Infor has assembled a portfolio of best-of-breed solutions for the Public Sector. We have experienced phenomenal growth in the last 19 years, as reflected in the dramatic increases in our overall revenues. We have a strong global presence, with every region of the world contributing to our growth. We have a healthy stream of revenue coming from all parts of our business - licenses, services, and maintenance. And we're above the industry average in our customer retention numbers.

The solution proposed by Infor, Infor EAM Fleet Management, reflects 27+ years of experience in the asset management and maintenance market. Released initially as Datastream 7i, the data model underlying Infor EAM was first introduced in 1995. Although it has been significantly expanded in scope and functionality, the EAM data model has a demonstrated track-record of supporting organizations who manage millions of individual assets.

Date established;	Infor (US), LLC was incorporated June 1, 2005
Ownership (public, partnership, subsidiary, etc.)	Infor is privately owned.
Location in which the Vendor is incorporated;	Infor (US), LLC was incorporated in the State of Delaware.
Office location(s) responsible for the performance of proposed tasks;	Infor 641 Avenue of the Americas New York, NY 10011 Infor Public Sector 13560 Morris Road, Suite 4100 Alpharetta, GA 30004-8995

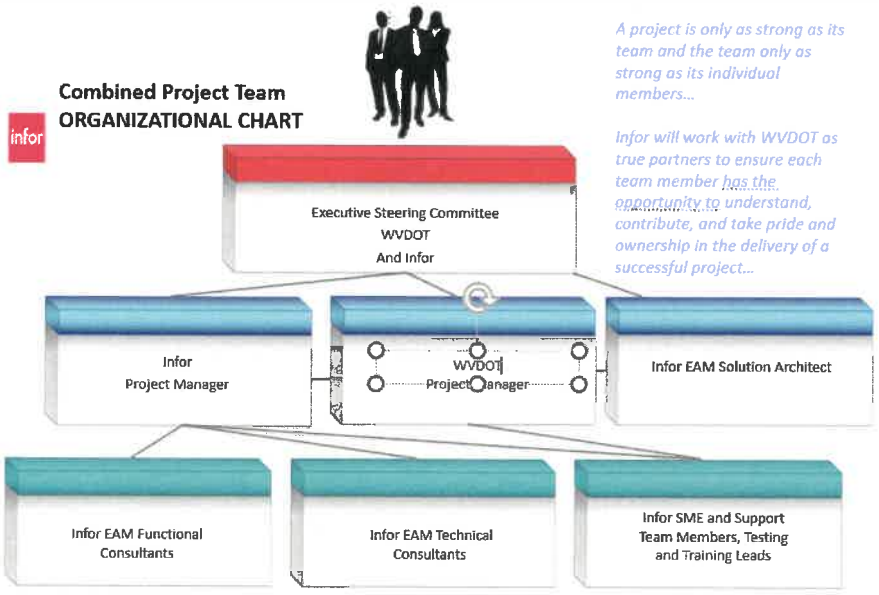
Off-site Activity and the Locations Involved

Infor has been very effective delivering projects remotely due to COVID-19. We are flexible to work with WVDOT using a mix of onsite and offsite project work that works best for you. Infor offers both on-site and remote implementation teams dependent on project tasks. Infor would recommend that the core project team work on-site with the WVDOT project team to promote collaboration. However, there are various activities that require less project team interaction and could be performed remotely to reduce costs. Remote services can be delivered by US-based resources as well as by offshore resources. The type of remote work could include development (reports, interfaces, configuration console and process automation), software configuration, migration execution and validation, documentation, project team support and project management reports.

Infor does offer offshore teams as well that can be leveraged to deliver a cost-effective solution for particular tasks. Infor's offshore teams are Infor employees and not third-party resources. As a large services organization, Infor can provide a wide variety of implementation scenarios to best suit customer and project needs.

Please also see our "Leading Teams and Projects Remotely" document in the Attachments Section.

Infor's Organizational Chart Relevant to this Project



A project is only as strong as its team and the team only as strong as its individual members...

Infor will work with WVDOT as true partners to ensure each team member has the opportunity to understand, contribute, and take pride and ownership in the delivery of a successful project...

Figure 2.1 – Organizational Chart

We have provided additional details on proposed staffing in response to the Staffing question later in this response.

Potential Conflict of Interest

Infor is not aware of any existing or potential conflicts of interest at the time of this submission.

Legal Statements

- **A Statement of whether, in the last ten (10) years, the Vendor and any officers in their individual or professional capacity or associated with another company have filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary or undergone the appointmentof a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details.**

Infor Response:

Not Applicable. None of the proceedings described above have taken place.

- **A Statement of whether there are any pending Securities Exchange Commission investigations involving the Vendor, and if such pending or in progress, an explanation providing relevant detailsand an attached opinion of counsel as to whether the pending investigation(s) may impair the Vendor's performance in a Contract under this RFP.**

Infor Response:

Not Applicable as there are not any pending Securities Exchange Commission investigations involving Infor.

- **A Statement documenting all open or pending litigation initiated by Vendor or where Vendor is adefendant in a customer matter;**

Infor Response:

Infor is a multinational corporation with thousands (if not hundreds of thousands) of agreements in place. As with any large commercial enterprise, over the course of Infor's lengthy history there have been contract disputes. Where such disputes arise, Infor's standard procedure is to achieve an amicable resolution by directing its efforts to resolving disputes through communication and dialogue.

As of the date of this response, there is no pending litigation to which Infor is a party and for which it has received service of process that would affect adversely its ability to enter into the engagement proposed pursuant to this RFP or to perform the services proposed to be provided hereunder.

- **Full disclosure of any public sector Fleet and Equipment Management System related contracts terminated for cause or convenience in the past five (5) years;**

Infor Response:

Infor is a multinational corporation with thousands (if not hundreds of thousands) of agreements in place, many of which are with public entities or agencies. As with any large commercial enterprise with Infor's lengthy history there may be contract disputes that have arisen on occasion. Where this occurs, Infor's standard procedure is to achieve an amicable resolution by directing its efforts to resolving disputes through communication and dialogue. However, please note that Infor does not track contract terminations and cannot provide any additional information about them.

- **Full disclosure of any criminal or civil offense;**

Infor Response:

Please provide additional detail regarding what is being requested with this item. However, please note that, as of the date of this response, Infor is not aware of any criminal actions against Infor that would affect adversely its ability to enter into the engagement proposed pursuant to this RFP or to perform the services proposed to be provided hereunder.

Financial Stability

Please see the letter from Infor Chief Financial Officer attesting to our financial stability that is included immediately following this page.

641 Avenue of the Americas
New York, NY 10011
800-260-2640
infor.com

CONFIDENTIAL

Date, September 9, 2021

Tara Lyle, Buyer Supervisor
2019 Washington Street, East
Charleston, WV 25305

Subject: Infor Financial Status

Infor is a global leader in business cloud software specialized by industry. We build industry CloudSuites that provide a complete solution for organizations to run their businesses efficiently in a secure cloud environment, leveraging the speed, scale, and economic advantages of cloud software. We deliver integrated enterprise business solutions and offer software license updates and product support as well as other services including consulting, advanced product services, hosting, and education.

We serve a diverse and sophisticated global customer base, with approximately 65,000 customers ranging from Fortune 500 enterprises to small-to-midsize companies (SMBs). Our market leadership in key verticals, including manufacturing, distribution, healthcare, public sector, and hospitality, results from the fact that we serve many of the largest and most well-known customers in those verticals. Our embedded product base, effective customer support programs and dedicated maintenance and renewals focus have resulted in high customer retention rates of 93%. As of December 31, 2020, we have approximately 16,800 employees worldwide and have offices in 44 countries.

According to International Data Corporation (IDC), Infor is the 3rd largest global ERP software vendor based on pro forma software revenue generated during the calendar year 2019 (June 2020, IDC #US46540020).

Our annual revenue of approximately $3 billion, with over 68% coming from recurring SaaS and maintenance subscriptions, provides us strong cash flow generation.

Infor is privately held by Koch Industries, Inc., one of the largest private companies in America with estimated annual revenues as high as $110 billion, according to Forbes. Koch Industries is an owner with a long-term perspective, giving Infor the ability to plan and invest for the long run, not just quarter-to-quarter. Our sponsor has substantial available capital and has demonstrated the ability and willingness to invest additional equity in Infor to facilitate our growth.

In May and June 2020, we repaid/redeemed all of our outstanding debt and issued new investment grade senior notes with ratings of Baa2/BBB.

Infor is positioned for continued success in the software market. We will continue growing by adding innovative solutions that can help our customers be successful. We deeply value our customers and we look forward to a long and beneficial partnership with you.

Best Regards,

Matt Flamini
Chief Financial Officer
Infor

3-Subcontractor Company Profiles

Fleet and Equipment Management System Software Provider

Infor, the primary vendor for this proposal, will provide the software and services for this project.

Third Party Software Providers

Additional third-party software will not be required.

4-Licensed Product Information

Business Applications

Provider	Product	Modules	Current Version	Next Release and Date*
Infor	Infor EAM Enterprise (base)	Work Management, Asset Management	11.6.1	11.7 Date: 11/2021
	Infor OS Essentials	ION, Ming.le, DataLake, IDM, Single Sign-On	NA	NA
	Web Services Toolkit/Connector	Integrations	NA	NA
	Infor EAM Advanced Modules	**Requirement Need / Comments**		
Infor	Advanced Reporting	Standard Reports and Ad-hoc reports	11.6.1	11.7 Date: 11/2021
	Alert Management	Alerts, Notifications	11.6.1	11.7 Date: 11/2021
	Electronic Signatures	Electronic Signatures	11.6.1	11.7 Date: 11/2021
	Fleet Management	VMRS Codes, Fuel Management	11.6.1	11.7 Date: 11/2021
	GIS	ESRI GIS	11.6.1	11.7 Date: 11/2021
	Mobile	Work Orders	11.6.1	11.7 Date: 11/2021
	Optimized Scheduler	Scheduling Optimization	11.6.1	11.7 Date: 11/2021
	Reliability Planning & Analysis	Reliability, Risk, Analysis	11.6.1	11.7 Date: 11/2021
	Service Request	Service Requests	11.6.1	11.7 Date: 11/2021
	Additional Infor Solutions	**Requirement Need / Comments**		
Infor	Infor Birst	Reports, Analysis	7.8	TBD
	Infor UAP	Client Training Guides, Videos	NA	NA

Infor release a major version of its products approximately every 12-18 months. Incremental updates are released as needed.

Technology Products

The Vendor shall provide the WVDOT with network, desktop, and server requirements for all software.

The Vendor shall specify the requirements for all required cache servers, web servers, applicationservers, and database servers for installation per the Vendor's specifications.

Infor Response:

The Infor Cloud provides customers a fully managed, Software-as-a-Service (SaaS) solution, including a comprehensive set of system, application, database and infrastructure installation and support services. These services provide full administrative coverage, patch and update management, database tuning and performance management, backup and DR capabilities, and a comprehensive set of proactive monitoring and health checks. Infor's Cloud solutions leverage Amazon Web Services (AWS) to provide the physical facilities, network infrastructure and core services upon which our applications are delivered.

The Infor solution is a complete SaaS solution. No onsite installation besides a recent supported browser is required. All access to Infor's Cloud applications is over the public Internet, leveraging encrypted connections (HTTPS over TLS) via a compatible web browser. No unencrypted communication is ever allowed into or out of the Infor Cloud.

Bandwidth into and out of the Infor Cloud is, for practical purposes, unlimited and is managed and monitored through our partnership with Amazon Web Services (AWS). As with all Cloud-delivered services, the customer is responsible for providing connectivity to the Internet for itself and its authorized users and for monitoring the availability of bandwidth and making adjustments as necessary. Infor resources can assist the customer in estimating bandwidth usage based on our experience with similar customers.

Application response times can vary widely depending on the application function being performed and the volume of data the function is expected to process/analyze. Infor monitors application response times from the point when a request is received until a response is returned and uses this data to help understand where bottlenecks and other issues may occur if not addressed. Infor does not publish or commit to application response time SLAs due to the many variables outside of our control which can affect timings.

Ad Hoc Reporting Tools

A reporting solution shall enable business users to create their own reports and explore enterprise data bydownloading data or utilizing standard ad hoc reporting tools.

Infor Response:

There are over 200 standard reports within the application that provide a basic layout, summary, and analysis of the data within the system.

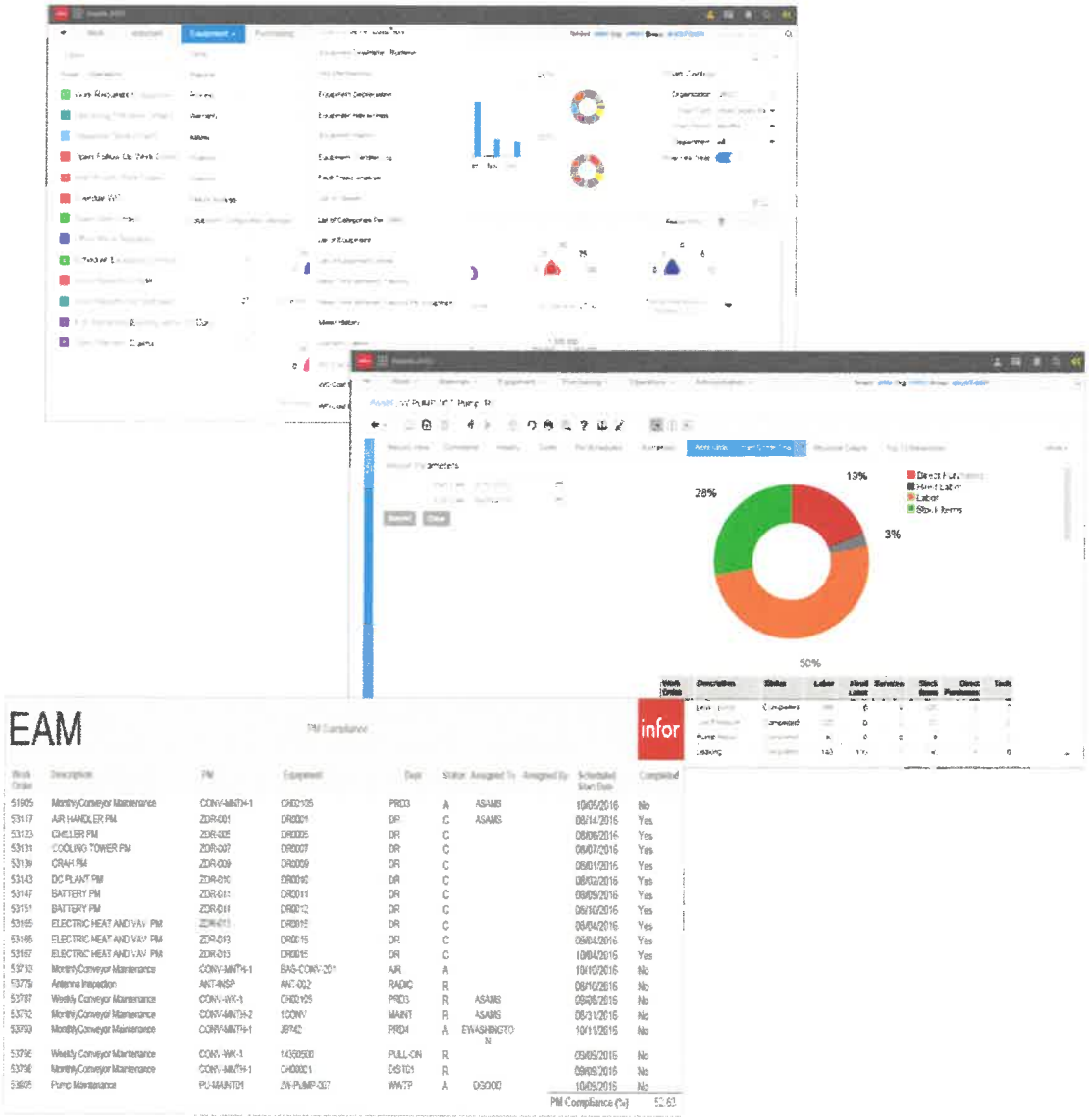


Figure 4.1 - Infor EAM Sample Reports

In addition to the over 200+ Standard Reports available in Infor EAM, ad hoc reporting needs can be addressed within the solution through the Infor EAM Advanced Reporting tools. As an extension of the standard reports, Infor EAM Advanced Reporting is a built-in reporting engine that will allow modification of the existing reports as well as create any number of additional WVDOT defined ad-hoc reports. These reports can be added to the menu structure and added into screen tabs as well as automatically run and emailed to various users on a distribution list. Standard reports and user-defined reports created with Advanced Reporting module can be saved in PDF, HTML and Excel formats.

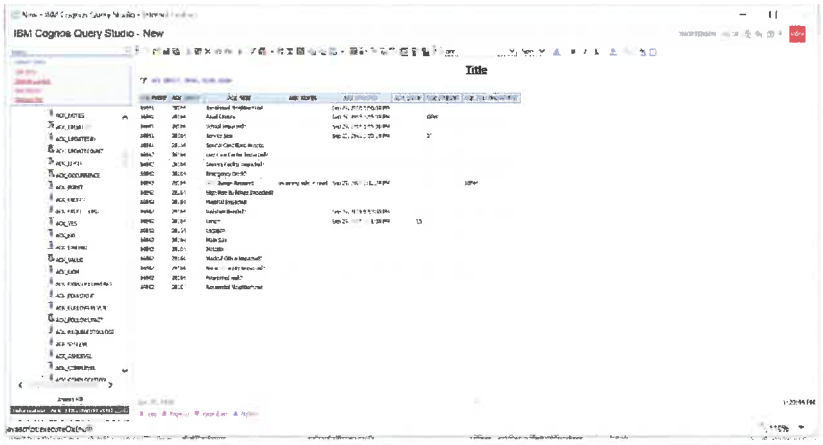


Figure 4.2 - Infor EAM Ad Hoc Reporting

Dataspies, intuitive savable reusable queries, are used within Infor EAM to extract data and view the information. Dataspies can be developed with multiple filter criteria and sorts, and a user-defined layout of data fields. Dataspies can be global or specific to the user. The user can determine which Dataspy is the default list view, while easily switching Dataspies. Additional filters can be added to further filter the Dataspy results. User-defined grids/lists with the ability to join data from multiple tables can be easily created and queried with Dataspies. All list views can be exported to MS Excel.

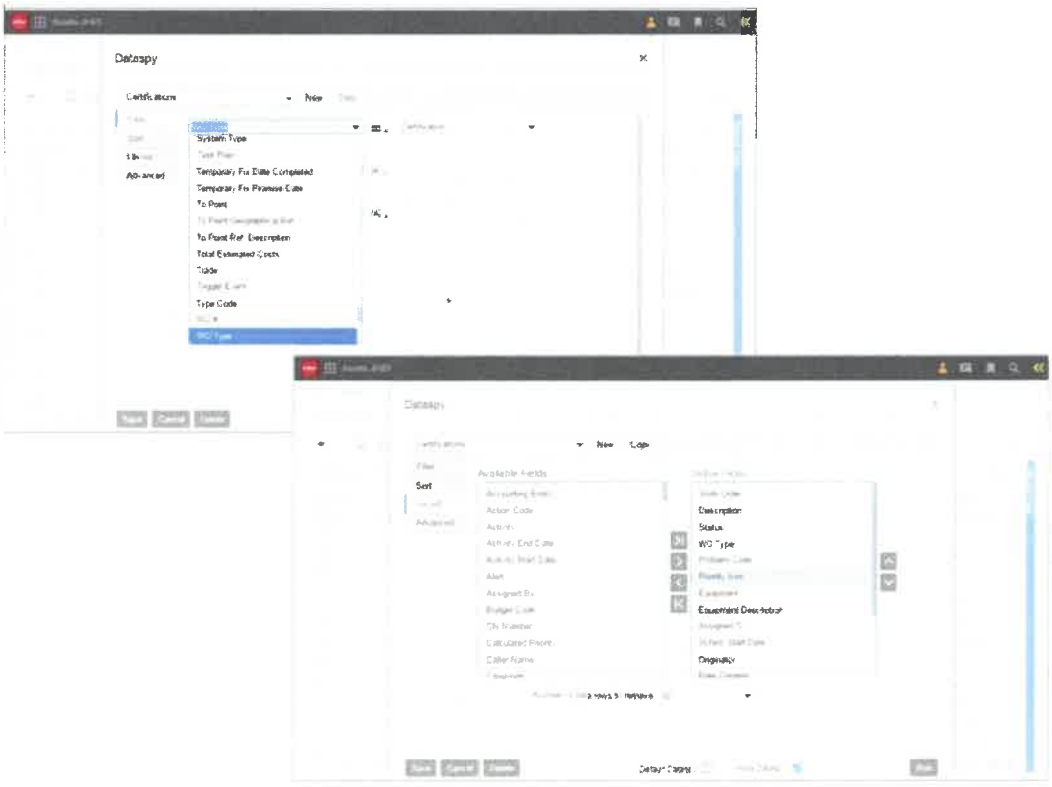


Figure 4.3 - Infor EAM Dataspy Query

A user-configurable Dashboard with Inboxes, Charts and KPIs is provided as a Start Center in Infor EAM. The Dashboard consists of simple queries into the database and extracts the information in an easy to view format. Links to lists of summarized data can be added to the KPIs and Inbox items.

Start Center provides the WVDOT user with the capabilities to drill down into the corresponding records representing the values displayed. There can be an unlimited number of Inbox items, Charts and KPIs which can be user-group specific, based on what the WVDOT user needs to see.

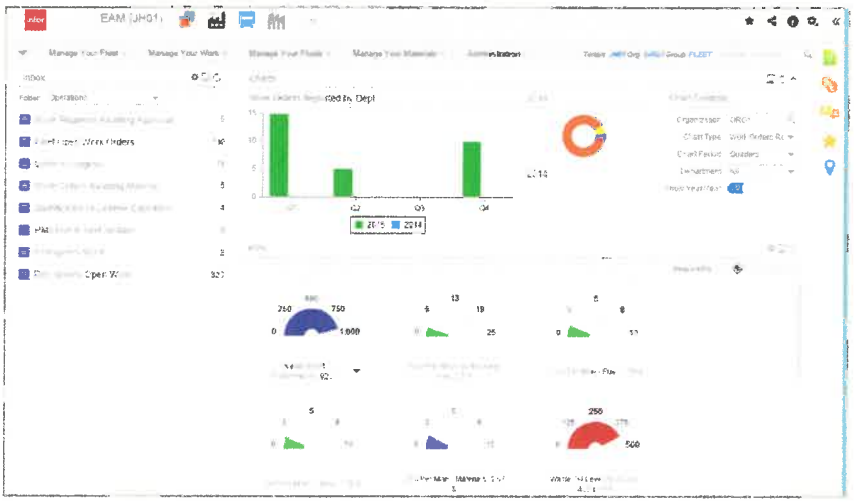


Figure 4.4 - Dashboard

Business Intelligence Tools

The expectation for Business Intelligence is to provide the capability for both tactical data analysis associatedwith program performance and strategic data analysis associated with long-tern planning and measurement of operational performance against strategic goals.

Infor Response:

Infor Birst is an optional add-on Business Intelligence (BI)/Analytics tool that allows WVDOT to dynamically mine a rich trove of data quickly enough to support important decisions. Infor Birst delivers pre-built data models, strategic KPIs, operational metrics, and a library of reports and analytic widgets, configured for the industry. As a modern BI and analytics platform, Infor Birst is uniquely positioned to provide end-to-end capabilities to align with WVDOT needs for Infor EAM analytics and reporting. Key differentiators include:

- Complete end-to-end analytic capabilities, including a wealth of source connectivity options, ETL, data modeling, data storage, reporting, self-service data visualization, interactive dashboards, and mobile analytics.
- The ability to integrate and organize multiple different data sources for reporting purposes
- Agile self-service BI for all user profiles, governed by a central source
- Multi-tenant cloud infrastructure which provides 99.7% uptime SLA, greatly minimizing the impact on IT Resources & ensuring a highly available analytic resource

Infor Birst is designed to deliver on the promise of advanced reporting for Infor EAM and any other WVDOT data source. Infor Birst can fulfill WVDOT requirements in providing a competitive advanced reporting, BI, and analytics solution for today while growing into the future.

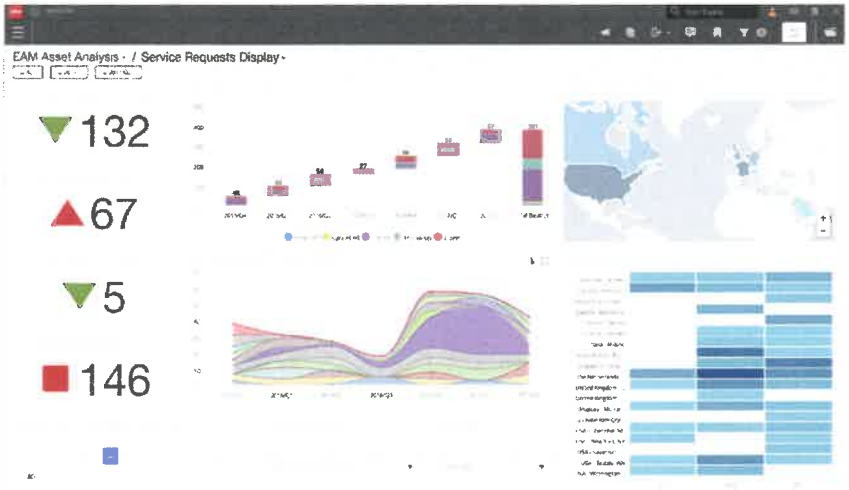
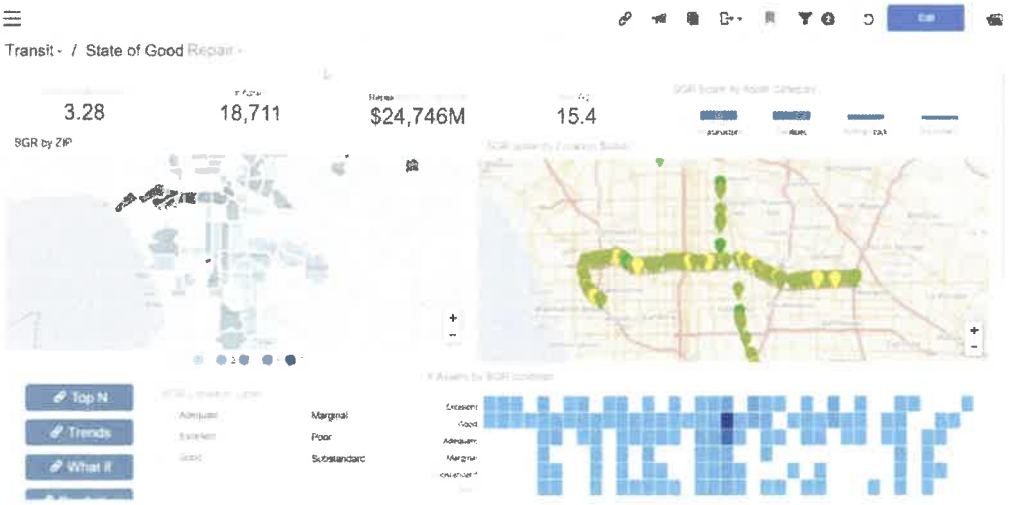


Figure 4.5 - Infor Birst Dashboard

Data within Infor EAM is available with appropriate access controls and security in place to allow WVDOT's existing BI analytics tools to perform additional analysis/reporting consistent with existing WVDOT practices. Data can be exported directly using the Dataspies and reports within Infor EAM to csv formats or accessed through the integration tools available with Infor EAM. Using Infor DataLake, multiple existing data sources can be incorporated and accessible in combination with Infor EAM information to expand the analysis capabilities for WVDOT providing a more robust detailed picture of operations.

Additionally, data can be visualized with graphs, charts, and more advanced analytics using the Infor EAM Advanced Reporting and Infor Birst analytics tools.



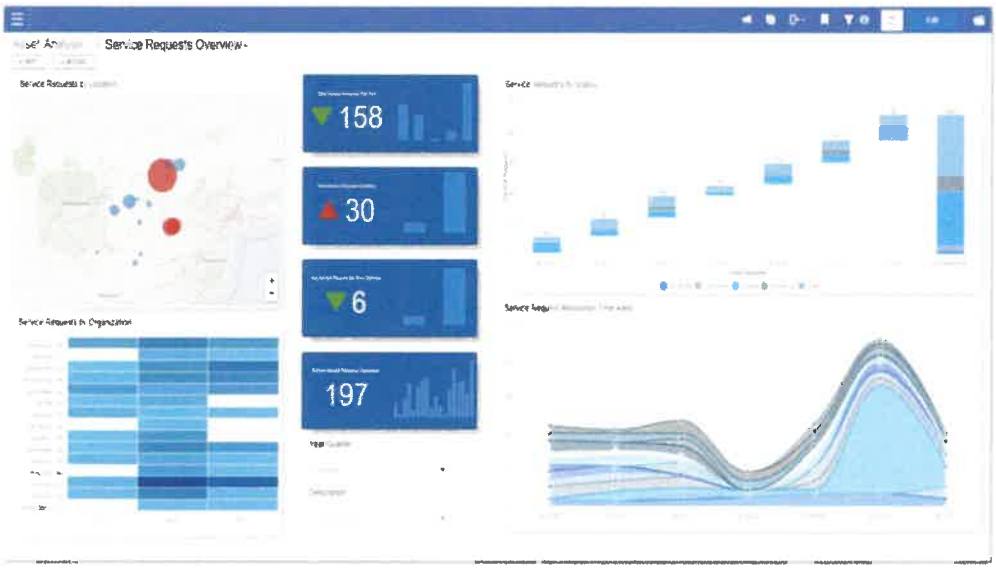


Figure 4.6 Infor EAM Birst Data Visualizations

Product Maintenance

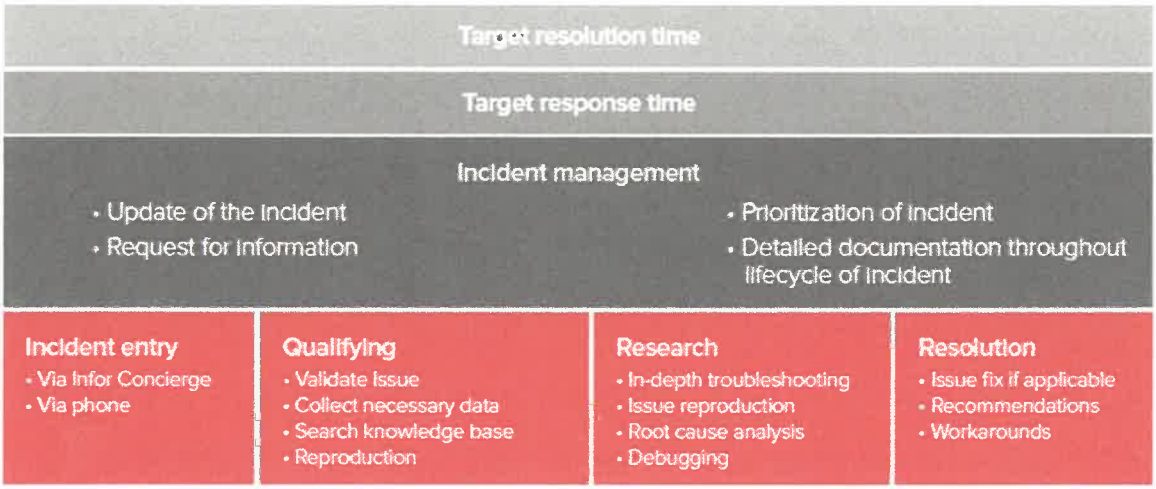
The approach of the Fleet and Equipment Management System SoftwareProvider(s) and the Third-party Software Provider(s) to meet the WVDOT's requirements to provide product maintenance

Infor Response:

As both primary Vendor and software provider, Infor will provide Technical Support to WVDOT.

Infor's incident management support model includes four main areas:

- Incident entry
- Qualifying
- Research
- Resolution



- **Incident Entry:** Customers may initiate an Incident via Infor Concierge, located at concierge.infor.com, or by calling one of the Infor Support Centers. When a new Incident is entered via Infor Concierge, it is automatically routed to a Support analyst, or to the appropriate queue to be picked up by the next available Support analyst. Another option is to call the Infor Support Center and speak to a member of the Infor Customer Care Team. The Customer Care Team member will ask for specific information about the Incident, including a short description of the issue. The Incident will then be routed to the appropriate Support analyst or appropriate Incident queue to be addressed by the next available Support analyst
- **Qualifying:** Once an incident has been received, the support analyst may contact you for additional information. Clarification of the incident may be necessary before in-depth analysis can be performed and before the support analyst can begin to resolve the incident. Qualification steps may include without limitation, searching the Product Knowledge Base, reproducing the reported issue, and/or collecting additional information to validate the issue
- **Research:** Using the results from the qualifying step, the support analyst will perform further research, and testing to help resolve the incident. This may include, without limitation, debugging, root cause analysis, reproduction of the issue and in-depth troubleshooting. If the Software does not work in accordance with then then-current documentation, Support will work with Infor development and proactively notify you of any updates to the Incident.
- **Resolution:** Infor will propose a solution that we believe resolves the issue. It will be the responsibility of the customer to close the Incident, which can be done at any time. Most Incidents are resolved by the Support analyst working with the customer, and are closed upon mutual agreement of resolution, or they are closed unilaterally by the customer. Incidents that involve Software not working in accordance with the then-current documentation will be scheduled and addressed, with the higher severity level issues being given priority. The open Incident will be periodically updated with the new information. Notwithstanding anything to the contrary set forth above, not all resolutions require an actual fix and may be resolved with a workaround or other recommendations, as solely determined by Infor

Resolution Process: Incident resolution is often an investigative process that is iterative, with many variables, and at times requires collaboration and troubleshooting by various teams within Infor and a customer to bring the Incident to resolution. The nature of this process makes providing target resolution times difficult. Infor works to allow a customer to continue to do business while Infor investigates the cause of an issue and provides regular updates as Infor progresses through the troubleshooting process.

Please note that a detailed description of all Infor Technical Support processes and services in the *Infor Support Operations Handbook* included as an attachment to this proposal.

Future Direction

The Vendor shall describe the future direction of the technology of the proposed products. Also, include future plans for public sector functionality for the components of the proposed solution. The Vendor should discuss in some detail the strategic product plans for the proposed software products in this response. What have been the significant enhancements to the products in the past few years, and what is expected in the next three (3) years? Describe how the proposed solution provides a stable robust environment for the WVDOT and provides a platform for growth and technological advances for the future.

Infor Response:

At Infor, we believe that businesses and organizations in our target markets are increasingly taking advantage of information technology to manage their operations more effectively. Our enterprise software products are developed to meet the specific needs of customers in our targeted verticals and generally enable customers to have functionality tailored to the unique needs of their markets. We intend to continue the design, development and deployment of industry-specific products and technologies that maximize ease-of-use and provide a lower total cost of ownership for customers by

saving them time and resources during implementation. To maximize the benefits of our industry-specific solutions, we complement our industry expertise through our professional services organization and strategic relationships with key partners.

Infor does not release product roadmap information as part of the RFP process.

5-References

Reference #1

Organization Name	Miami-Dade County
Project Name	EAM Implementation
Project Description	The County is currently using Infor EAM 11.4 throughout 9 county departments. Modules in-use: Asset Management, Work Management, Materials Management, Advanced Reporting, Mobile, Web Services, Data Prompts, Databridge, Equipment Management, Purchasing, GIS, Projects, Facilities Management, Construction Management, Budget Management, Inspections/Monitored Data, Call Center, Loaner Pool, Preventive Maintenance, Grid Designer, Flex, Custom Tabs, Email Messenger and OpenCad. Miami-Dade has numerous departments deployed on Infor's EAM solution. Some of the larger departments alone went through sizeable transitions from multiple solutions into one, centralized EAM solution for all functions. This included numerous remote locations being standardized on a common set of business processes. Specific example, Infor Services implemented the Miami-Dade Water and Sewer Department (WASD): • 7,918 miles of water lines, 6277 miles of sewer lines • 3 water, 3 wastewater treatment plants • 1,048 pump stations • Over 34,000 parts in 9 inventory storerooms • 1,200+ vehicles and heavy equipment trucks • 24/7 emergency communication center Miami-Dade Transit uses Infor EAM for Work and Asset Management for: • Over 760 Buses • Over 170 Rail • Over 29 Movers • Manages more than 15,800 parts in inventory By tracking Mean Distance Between Failures on the fleet they manage, Miami-Dade County has seen significant improvement in the reliability of their fleet over time using Infor EAM to better manage preventive maintenance.
Contact Name	Jeremy Clark Division Director of County Systems

Contact Mailing Address	5680 Southwest 87th Avenue Miami, Florida, 33173
Contact Phone Number	305-596-8047
Contact Email Address	Jeremy.Clark@miamidade.gov
Fleet and Equipment Management Software Product and Release Number(s) Implemented	Infor EAM 11.4
Project Start and End Date	2003-Ongoing
Contract Value	Confidential, to be provided by Client.

Reference #2

Organization Name	The Wenger Group
Project Name	Fleet Maintenance Project
Project Description	Wenger Feeds, LLC Founded in 1944, Wenger Feeds is a manufacturer of poultry, dairy, and swine feed headquartered in Rheems, PA and serving the Mid-Atlantic region. Wenger Feeds operates mills in Benton, Rheems, Mount Joy, Hempfield, Spring Glen, Shippensburg, and Muncy, Pennsylvania and Massey, Maryland. The company also operates WFM Transport, Inc. which provides professional commercial transportation equipment and services to Wenger Feeds, LLC, Nutrify, LLC, Dutchland Farms, LLC, and other customers, a truck garage and a soybean processing plant in Elizabethtown , PA. Wenger Feeds' customers provide eggs, egg products, poultry, and pork products to the Mid-Atlantic region, an area that comprises nearly one fifth of the U.S. population. By using the Infor EAM solution to manage costs, reduce truck trips into the shop and improve processes, TWG expects to reduce their Cost Per Mile (CPM) saving the company significant dollars. Further elements of savings associated with work productivity, streamlined processing with work orders, paper elimination, spare parts carrying costs, field downtime and decision support all lead to process improvements and cost savings. The Wenger Group Fleet consists of • 82 power units (tractors) • 70 trailers • 10 straight trucks, and • 42 small (lite) vehicles Other beneficial Factors are:

	• Quality improvements (with more accurate reporting, better scheduling, and more consistent/efficient maintenance procedures • Utilization of tables (mobility) to access work orders and perform maintenance checks thereby streamlining workflow • The system will be an important first step in establishing the target (and highly integrated) enterprise architecture in the Cloud. • Importantly the system is extensible to the maintenance department and is a tool that will enable more accurate tracking and execution of mill maintenance tasks.
Contact Name	Karen Pheiffer
Contact Mailing Address	101 W Harrisburg Ave, Rheems, PA 17570
Contact Phone Number	717-366-1178
Contact Email Address	karen.peiffer@thewengergroup.com
Fleet and Equipment Management Software Product and Release Number(s) Implemented	Infor EAM 11.6
Project Start and End Date	March 5, 2020 – July 2020
Contract Value	Confidential, to be provided by Client.

Reference #3

Organization Name	Capital Metropolitan Transportation Authority
Project Name	EAM Cloud Deployment
Project Description	Capital Metro ("CMTA") is the regional public transportation leader for Central Texas and is headquartered in Austin, Texas. CMTA services over 31 million passengers every year across bus, train, and paratransit vehicles. The implementation of CloudSuite for EAM replaced CMTA's previous maintenance-management system, Spear, and was undertaken to ensure that all transit assets and supporting facilities are maintained in a state of good repair; to reduce unplanned breakdowns by enhancing preventive maintenance capabilities and other best-practices; to assist in planning for replacement at the end of an asset's lifecycle; and to provide robust insight and reporting capability into the state of assets and their maintenance. In addition, CMTA also lowered their IT costs and greatly improved their disaster recovery capabilities. The EAM solution was integrated into several of CMTA's key systems, including OrbCAD, Trapeze, and GasBoy, and was also populated with legacy

	data from various CMTA applications to provide a total view of the assets, their location, life history, and other key elements. The Infor team provided project management, project directorship, functional and technical expertise, primary configuration work, report-writing, test-script development, training, and go-live deployment and post-go-live support. CMTA assets and facilities being managed within EAM include: • Metro Buses: 368 • E-Buses: 12 • MetroRapid vehicles: 55 • Trains: 10 diesel electrics • Vanpools: 257 • Paratransit vehicles: 213 Bus stops: 2,300 • Park & Rides/transit centers: 17 • Commuter rail: 9 stations along 32 miles of track • Freight rail: 162 miles • MetroRapid: 26 station pairs along each of the two MetroRapid corridors
Contact Name	Robert Shugart
Contact Mailing Address	2910 E 5th St, Austin TX 78702
Contact Phone Number	512-369-7772
Contact Email Address	robert.shugart@capmetro.org
Fleet and Equipment Management Software Product and Release Number(s) Implemented	CloudSuite for EAM 11.6
Project Start and End Date	10/1/2018 - 12/15/2020 for the primary project, with ongoing services support and additional work taking place.
Contract Value	Confidential, to be provided by Client.

6-Proposed Project Staff and Organization

Project Organization

Vendors shall describe their project staffing strategy to coincide with their recommended implementationapproach, including any proposed phasing. As part of this project staffing strategy, the Vendor shall recommend when WVDOT participation is expected, how the WVDOT's employees are going to be integrated into the Project Team, where the project team is primarily located and what methods are goingto be used to ensure skills and knowledge transfer.

Infor Response:

Roles and Responsibilities

Role	Responsibilities
Infor Team Roles / Responsibilities	
Infor Project Sponsor	An Infor Project Sponsor will work directly with the WVDOT Project Team to plan the proposed implementation project. The Project Sponsor has been involved with Infor implementation projects in similar organizations and brings a great amount of knowledge to the project team. The Project Sponsor is ultimately responsible to the WVDOT Steering Committee on project status, issues, and successes. Responsibilities: ❑ Overall executive visionary for Project success ❑ Primary escalation point for Licensee ❑ Client satisfaction ❑ Quality assurance of both Infor & Licensee assigned tasks ❑ Infor resource management ❑ Detail planning, scheduling deployment & technical resources assigned to the project ❑ Interfaces with Licensee managers & project executives
Infor Project Manager (Onshore)	The Infor Project Manager will work directly with the WVDOT Project Manager to plan, execute, and monitor the Infor project. The Project Manager has been involved with Infor implementation projects and brings a great amount of knowledge to the project team. The Project Manager will serve as the primary agent in helping WVDOT achieve its tactical goals including a successful implementation, a positive business relationship with Infor, and to become and remain a satisfied client of Infor products and services. The Project Manager will also be responsible for the leadership of a team of consultants as well as assisting in the coordination of WVDOT resources as they relate to project related tasks. The Project Manager will: Responsibilities: ❑ Primary contact point for Licensee ❑ Client satisfaction ❑ Quality assurance of both Infor & Licensee assigned tasks ❑ Infor resource management and financials. ❑ Detail planning, scheduling, and analysis ❑ Manages the Infor application & technical resources assigned to the project ❑ Interfaces with Licensee managers & project executive ❑ Shared responsibility with Delivery Director

Role	Responsibilities
Project Manager (Offshore)	Responsibilities: ❑ Contact point for Licensee ❑ Client satisfaction ❑ Quality assurance of both Infor & Licensee assigned tasks ❑ Infor resource management ❑ Detail planning, scheduling, and analysis ❑ Manages the Infor application & technical resources assigned to the project ❑ Interfaces with Licensee managers & project executive ❑ Shared responsibility with Delivery Executive
Infor Application Leads	Infor Application Leads are Infor product specialists. These consultants have a concentrated knowledge base in Infor applications and will provide expertise in our core competencies to assist WVDOT during the project. These individuals are assigned to WVDOT's project based on specific industry and/or application knowledge and experience. Responsibilities: ❑ Assist Project Managers with specific implementation project deliverables ❑ Provide application specific education ❑ Acts as SME in functional design sessions ❑ Identifies and addresses complex business requirements ❑ Determines the functional fit and gaps of complex business requirements relative to Infor's core product functionality ❑ Conducts functional design reviews and provides feedback/ recommendations on the appropriate approach ❑ Ensures requirements are translated into clear specifications for development ❑ Lead over all Infor application business analysts and configuration consultants
Infor Technical Lead	Infor Technical Leads provide services that address many of the IT specific needs of WVDOT. These services include data conversion planning and execution, interface/integration planning and development, workflow, and customization design. They also provide consulting on report writing tools to address reporting and inquiry requirements. Responsibilities ❑ Technical knowledge of application architecture ❑ Provide conceptual designs for in-scope configuration extensions ❑ Consult with Licensee on systems integration of Infor applications to other systems ❑ Assist Project Managers with specific technical implementation Project deliverables ❑ Lead over all Infor technical consultants supporting the Project
Infor Change Management Lead	An Infor Change Management Lead is an expert in preparing an organization for an EAM implementation. Responsibilities: ❑ Assess organizational readiness for change ❑ Develop organizational change management strategy ❑ Identify organizational change management procedures

Role	Responsibilities
	❑ Plan and conduct organizational transition program ❑ Define and jointly implement organizational change management activities
Infor Training Lead	Infor Training Leads have extensive experience in the planning, strategy and execution of training program(s) designed to address the needs of the various user communities who will access and use the Infor System. Responsibilities ❑ Work with the Infor Project Manager to develop and manage the training program. ❑ Determine/confirm training scope and approach ❑ Define training responsibilities ❑ Create training development plan ❑ Determine required package training ❑ Develop training strategy document ❑ Develop end-user training plan ❑ Coordinate development of training materials ❑ Assist in the coordination of scheduling and conducting end-user training ❑ Coordinate scheduling and training of staff for train-the-trainer strategy

Infor leverages the diverse and complementary skill sets of our global infrastructure through our Global Delivery System (GDS) which delivers high-value functional, project management, and technical services through an offshore model. Our GDS team will participate in multiple ways throughout this project.

WVDOT Team Roles / Responsibilities

A key component in a successful implementation is to define the individuals that make up the project team. The WVDOT Team should include an Executive Sponsor/Steering Committee, Project Manager, Organizational Change Manager, Work Team Leaders for each application area, Subject Matter Experts, Technical Lead and Technical Support staff, Testing Lead, and Training lead. WVDOT will need to establish implementation team roles that align with the brief descriptions for each of these roles below:

WVDOT Team Roles / Responsibilities	
WVDOT Project Sponsor	It is assumed the Project Sponsor will communicate the project vision and success factors and establish project guidelines. He will direct policy/procedure decision-making, assist in issue resolution, and assist in the final live cut-over readiness decision. The Executive Committee will report progress to the Project Sponsor. It is expected that the Project Sponsor will be responsible for securing financing and resources, addressing issues brought to his/her attention by the Infor Project Manager, and assist the WVDOT Project Manager in promoting the project throughout the WVDOT community.
WVDOT Executive Steering Committee	It is assumed that WVDOT will have the identified resources participate in Executive Committee that will meet regularly, and at key milestones. The Executive Committee will monitor the progress of the project, set priorities, make decisions regarding project issues, and resolve policy issues. The Executive Committee will also be involved in the final live cut-over readiness decision.
WVDOT Project Manager	It is assumed that WVDOT will assign one full-time Project Manager, who will work side-by-side with the Infor Project Manager to provide leadership to the project team. The Project Manager should have appropriate decision-making

WVDOT Team Roles / Responsibilities	
	authority. The Project Manager will develop and maintain the project plan, set priorities, coordinate, and assign tasks, and allocate resources to the plan. This individual will work closely with the Infor Project Manager to measure performance and progress and manage risk. The WVDOT Project Manager is usually very familiar with cross-functional requirements and upper management's goals and has the ability to lead a team of people from various departments. Although this person may be very knowledgeable of certain functional areas, they should not be assigned specific responsibilities for completing the activities associated with one or more applications. These responsibilities should reside with the Work Teams that are described below. The WVDOT Project Manager will report to the Executive Sponsor. The WVDOT Project Manager will oversee day-to-day project activities and be responsible for everything the project does or fails to do and has the primary responsibility for seeing to the Project's success. The Project Manager will: ❑ Lead the project ❑ Promote the project throughout the WVDOT community ❑ Develop project strategy and approach ❑ Provide status reports to the executive sponsors ❑ Engage and manage all contractors ❑ Manage issues and risks ❑ Manage WVDOT stakeholders' concerns
WVDOT Functional Leads (Work Teams / Core Project Team)	WVDOT will assign Functional Leads to attend project team training and become proficient in the applications to which they are assigned. Often these experts consist of Application Leads in their respective areas of expertise. The individuals designated for these roles should have: ❑ A good working knowledge of how your organization's processes are performed, and ❑ An understanding of the reasons for the current processes. As part of the implementation process, these individuals will be: ❑ Evaluating the new functionality available, and ❑ Determining how their organization can make the most of new functionality. These individuals will be considered part of the core Project Team. They will complete project tasks as assigned in the plan, assist with system setup and configuration including making design decisions and obtaining approval as needed for those, documenting design decisions and configuration, participate in all Testing phases, and assist in the design and testing of interfaces, process flows, form extension changes and reports.
WVDOT Subject Matter Experts (Work Teams / Core Project Team)	WVDOT will assign Subject Matter Experts (SMEs) to the core Project Team to work alongside the Team Leads. The SMEs will: ❑ Play a critical role in defining business needs and software functionality ❑ Provide expert knowledge of a particular business area that will enhance the project team's understanding of the business needs ❑ Provide direct support to WVDOT end users as necessary
WVDOT Technical Work Team	A team of Technical Experts will be involved in the technical duties that come with an Infor implementation. Examples include:

WVDOT Team Roles / Responsibilities	
	❑ Security administration ❑ Reporting ❑ Integrations ❑ Conversions, etc.
WVDOT Training Lead	This individual and their team will: ❑ Work with the Infor Project Manager and the Infor Training Lead to plan and execute end user training program(s) designed to address the needs of the various user communities who will access and use the Infor System. ❑ Conduct training needs analysis ❑ Create high-level end user training design with scope, approach, responsibilities, and development plan ❑ Determine required package training ❑ Coordinate development of training materials ❑ Coordinate and schedule training of staff for train-the-trainer strategy ❑ Coordinate and schedule end-user training
WVDOT End-User Trainers / Content Developers	This individual will: ❑ Develop training strategy document ❑ Develop end-user training plan ❑ Coordinate development of training materials
WVDOT Testing Lead	A team member responsible for: ❑ Working with the Infor Project Manager to deploy and manage the appropriate testing framework to meet the testing mandate. ❑ Implementing appropriate measurements and metrics to be applied against the Testing Scripts and Scenarios, ❑ Planning, deploying, and managing the testing effort for each phase of the project, and ❑ Managing the team members who are conducting the testing to assure proper due diligence is carried out throughout the testing process.
WVDOT Organizational Change Manager	This individual will: ❑ Work with the Infor Project Manager and the Infor Organizational Change Management resource to provide the framework and strategy for rolling out the new processes and procedures throughout WVDOT, and ❑ Utilize leading practices to drive the value that WVDOT is looking for in a new system and allows WVDOT employees to become acclimated to the new way of doing business while reducing stress levels due to the large change that will be occurring.

Personnel Summary Table

Vendors shall provide a Personnel Summary Table listing each proposed project team member. The Personnel Summary Table should be presented in tabular form similar to the example provided below including the proposed role(s), consultant name, total years of relevant implementation experience withthe VPS, years of experience in the proposed role, list of public sector clients in the proposed role, and relevant certifications.

Infor has provided the following resources as representative of the level of resources that would be assigned to the WVDOT project. However, the proposed team member's participation will be dependent upon the actual start date of the project, and their availability at that time.

Role	Consultant	Experience Summary
Project Director	Brett Rogers	20+ Years of Experience implementing asset and work management systems for cities, counties, and state-level transportation and maintenance organizations and other Public Sector entities. He is a Director within Infor's Global Professional Services group and is responsible for the successful delivery of Infor's Work Management, Asset, Inventory, and Customer Relationship Management solutions to clients throughout North America and parts of Europe and Africa. Brett's experience includes business process analysis, change management, large account management planning, and project program management. He leads a complete and veteran team of Project Managers and Consultants to deliver Infor's solutions to our clients. Brett offers great expertise in the Transit industry having experience as Project Director at CMTA (Austin), NYC MTA, Chicago Transit Authority, New Jersey Turnpike Authority to name a few.
Project Manager (onshore)	Jamie Saeed	30+ Years of experience in IT Project Management, Solutions Integration, Marketing and Customer Support. Jamie is a PMP and Member of PMI since 2002 with over 10,000 hours of current Project management / PMO experience. Currently reading for the PMI-ACP certification. Jamie brings Excellent Team Management Capabilities, proven Leadership & Interpersonal Qualities. He is conversant with Agile, practicing Scrum and KanBan concepts in hybrid Waterfall and Iterative cycle projects and comfortable with SSADM and RAD Methodologies Jamie's experience in Transit includes organizations such as: Coast Mountain Bus Company, Chicago Transit Authority, GO Transit, First Student Transit (a subsidiary of First Group America), among others.
Project Manager (offshore)	Krishnakumar (KK) Hariharan	KK is Certified Project Management Professional (PMP) from PMI with overall 23+ years of experience out of which 15+ years span across

		service delivery, project, program management and IT service transition, operations. Experienced in managing End-to-End implementation and Support of ERP and Custom applications in the role as "Project Manager". Strong experience in implementing enterprise applications, understanding client's business processes, planning, and implementation approach.
Technical Lead	Tom Didier	40+ years Computer experience working as a Designer, Developer, and Implementer of a variety of Application Packages. These include: • Asset Management • Payroll/HRM • Inventory Control • Financial Packages For the past nine years he has worked with the Infor EAM product as an on-site implementation specialist performing all task from initial customer training sessions through planning, design, system configuration and concluding with end-user training and go-live support. He is skilled in driving out business requirements, optimizing processes, anticipating challenges and roadblocks, and then providing solutions to overcome them. Additional responsibilities include understanding and providing guidance and assistance with Data Cleansing, Data Conversion, Reporting, and system customization.
Functional Lead	Matt Kramer	12+ years of experience using Infor EAM products across various industries, ranging from MP2 to EAM V 11.3 Matt is a certified Professional Engineer with experience providing customer facing direct support for construction management, strategic planning and implementation, workforce/asset/supply chain management and energy optimization. He has designed and delivered core team training, comprehensive system analysis, application implementation and go-live support for EAM clients. Matt excels in the core competencies of asset management design, business analysis, project management, application development, and user acceptance testing. He offers extensive executive level operational management experience with Federal and local government agencies, implementation experience with Manufacturing, Oil and Gas and Public Sector clients.
Functional Lead	Matt Costa	Matt is a Functional EAM Consultant who is passionate about helping clients solve their business process problems. His ability to deliver

		business process and application configuration expertise to Infor clients has contributed to the success of several EAM implementations. Leveraging his experience with Infor EAM and a deep understanding of the functional capabilities of the application, Matt is well positioned to effectively document and analyze business requirements, streamline processes, lead design workshops, and develop solutions that best fulfill the needs of the client. He delivers results through effective decision making, strong written and verbal communication skills, leadership and team building capabilities, and an unrelenting drive to exceed expectations.
Organizational Change Management Lead	Julyan Lee	20+ Years of experience, Prosci® Certified Organizational Change Management practitioner with expertise in enabling large and small-scale change initiatives to reach expected business value and projected outcomes. Strong experience in both waterfall and Agile Framework implementations. Recognized as a dynamic and outgoing leader with innovative ideas that provide effective solutions for his clients. Key strengths include ability to engage and build relationships at all levels within the client's organization in order to achieve stakeholder buy-in and remove roadblocks. Extensive capabilities and has a proven success record in business transformation initiatives, and implementing ERP systems such as SAP, PeopleSoft, Oracle, and Banner. Excels in project management, change readiness assessments, change management and communication strategy development and plan execution, leadership alignment, change impact analysis, stakeholder engagement, employee transition, business readiness, business process documentation, resistance management.
Training Lead	Walter Nicolau	15+ Years of experience. As a training project manager and principal training consultant, Walter works closely with clients to analyze, design, and deliver end user solutions, including end user training, post go-live performance support, and other organizational change management deliverables. As a certified project management professional, he manages training development teams through the entire life cycle of a project. He determines the overall end user solution and then manages teams in the creation, development, and delivery of the end user solution. He has worked in a wide range of industries and process areas. Most recently, Walter led the training development effort for the Infor EAM deployment for the City of Fresno CA,

		which covered Assets, Materials, Work Order Management and GIS functionality.

Resumes

The Vendor shall provide resumes for each role to be filled by Vendor personnel. Proposed consultantsshould be available to staff the project. For purposes of planning project staffing, the Vendor should assume a start date of November 1, 2021.

Infor Response:

We have provided resumes with details on experience for the resources named above in the Attachments Section.

Staffing Changes

No change may be made in the staffing of the Fleet and Equipment Management System project withoutthe prior approval of the WVDOT. Throughout the term of the Contract resulting from this RFP, the Vendor shall:

- **Provide qualified personnel to perform all Services required in this RFP;**
- **Promptly remove and replace personnel at the request of the WVDOT; and**
- **Provide written notice and seek WVDO'I: approval of any plan to add, remove and replace personnel**

Infor Response:

Infor will make every effort possible to keep the assigned resources identified for the WVDOT Project in-place for the duration of the project. We agree that consistency and the knowledge gained in the effort makes this a strategy we support. If for some unseen reason a resource is changed, we assure WVDOT that a new resource will be cross-trained and brought up to speed in a way that ensures no gaps in our services or delivery.

7-Vendor's Proposed Plan for Providing Services

Timeline and Implementation Phasing Approach

The Vendor shall describe its proposed implementation timing and phasing approach and include a phasing schedule and timeline which outlines their project plan and detailed staffing. It should be based on the Vendor's experience with the solution being proposed and provide the WVDOT with the best balance of cost and risk for the implementation of the VPS. The Vendor should also provide a thorough explanation of its rationale to support its proposed phasing. Related cost information should be presentedin the Cost Proposal and shall not be included in the Technical Proposal.

Any required clarifications regarding the phasing or timelines should be addressed during the Discussionand Best and Final Offer process.

The description provided should include the following information for each module:

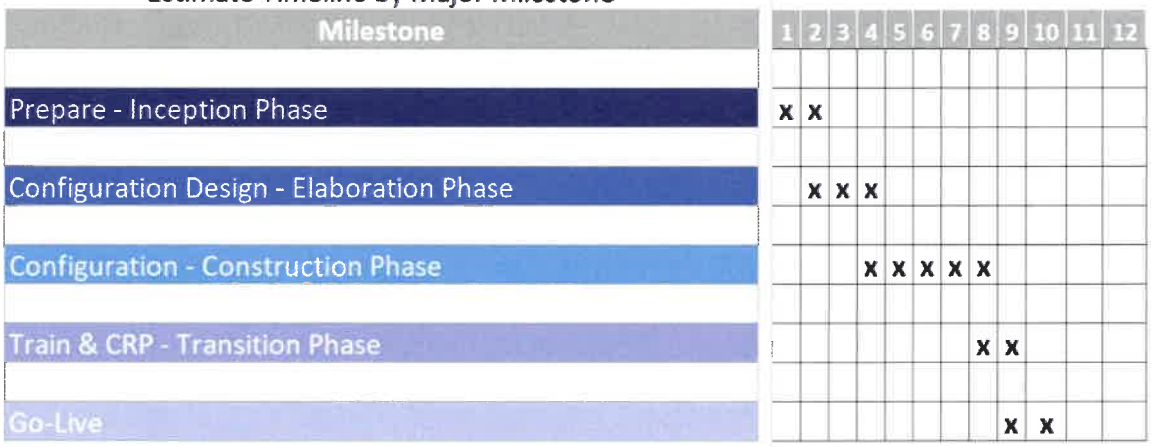
- **Implementation timeframes;**
- **Milestones and implementation phasing (if any);**
- **Deliverables with planned approval date and mapped in the work plan; and**
- **Any software upgrades that should occur during the project.**

Infor Response:

Project Timeline

IMPLEMENTATION TIMELINE

Estimate Timeline by Major Milestone



Project Deliverables & Project Milestones

The Project Deliverables/Activities listed below by IDM Project Phase are included in the Project scope:

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
Inception Phase Overview The Inception Phase is characterized by the Project Team finalizing the Project schedule and plan and Customer receiving foundational education on the in-scope business and technical applications and the Implementation Accelerator Business Processes.					
Project Management Plan	Scope Management Plan Documents how the Project scope will be defined, executed, controlled, accepted, and closed.	Signed SWO	Infor	Customer	Scope Management Plan (SCP.040)
Project Management Plan (.mpp format)	Schedule Management Plan Plans the Project schedule throughout the Project.	Signed SWO	Infor	Customer	Baseline Project Schedule (SCH.040)
Project Management Plan	Cost & Financial Management Plan	Signed SWO	Infor	Customer	Cost & Financial Management Plan (CST.030)

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
	Documents how Project cost and financial management will be performed, controlled, and closed.				
Project Management Plan	Communications Management Plan Documents how the Project will approach, perform, and control Project communications based on the information needs and requirements of Customer, Project team members and Project stakeholders.	Signed SWO	Customer	Infor	Communications Management Plan (COM.010)
Project Management Plan	Risk Management Plan Documents how the Project will identify, assess, manage, and control Project risks.	Signed SWO	Customer	Infor	Risk Management Plan (RSK.020)
Project Management Plan	Issue Management Plan Documents how the Project will identify, assess, manage, and control Project issues.	Signed SWO	Customer	Infor	Issue Management Plan (ISS.010)
Project Management Plan	Stakeholder Management Plan Documents how the Project will approach, manage, and control stakeholder engagement throughout the Project based on stakeholder interest and potential impact on Project success.	Signed SWO	Customer	Infor	Stakeholder Management Plan (STK.030)

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
Project Management Plan	Project Document Management & Version Control Plan Documents how the Project will manage, version, and store the various documents that will be created by the Project.	Signed SWO	Customer	Infor	Project Document Management & Version Control Plan (IPM.080)
IA Process Walk-through	Presentation of in scope IA Business Processes for Customer acceptance.	Signed SWO	Infor	Customer	Future State Process Model (BRE-050A)
Integration Strategy and Review	Review of Customer integration requirements.	Signed SWO	Infor	Customer	Integration Strategy and Governance (TAR.030)
End User Training Plan	Plan for development of End User training materials and delivery of training to prepare the End Users to manage their respective functions in the Infor system. End User Training Plan as defined in Section 1.8- End User Training Scope.	Refer to Section 1.8- End User Training Scope	Refer to Section 1.8- End User Training Scope	Refer to Section 1.8- End User Training Scope	Refer to Section 1.8- End User Training Scope
Elaboration Phase Overview The Elaboration Phase is characterized by Project Team Training, the initial Business Blueprint, Gap Analysis using the IA Business Processes and base application setup. The Phase concludes with the Conference Room Pilot and updated Business Blueprint.					
Infor Project Education	Infor to provide Project Team Education as defined in Section 1.7- Education Scope.	Baseline Project Schedule (SCH.040)	Infor	Customer	Project Team Training Evaluation (TRN.030B)
Business Blueprint: initial	This work Project activity reviews the in- scope IA Business Processes, captures the software and technology-related design scope, and	Key Data Definitions (MCO.010A)	Infor	Customer	Business Blueprint: initial (BRE.140A)

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
	describes the future business process and the organizational areas most affected by the solution.				
Gap Analysis	Customer and Infor will jointly review the initial Business Blueprint to determine any gaps between delivered IA Business Processes and Customer requirements and develop a prioritized list of gaps.	Business Blueprint (BRE.140A)	Infor	Customer	MoSCoW Traceability Matrix (BRE.100A)
Data Conversion Requirements Definition and Validation	Definition of the requirements for all scoped data conversions.	Refer to Section 1.3- Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope
Integration Requirements Definition: Functional and Technical Specifications	Definition of the functional and technical requirements for all scoped interfaces. Responsibility for deliverable is based on the interfaces scope of work per Section 1.4- RICE Scope.	Refer to Section 1.4- RICE Scope	Refer to Section 1.4- RICE Scope	Refer to Section 1.4- RICE Scope	Refer to Section 1.4- RICE Scope
Functional Security Requirements and Definition	Customer to create functional security matrix and assign roles and classes to users.	Application Setup Information (MCO.070C) MoSCoW Traceability Matrix (BRE.100A)	Customer	Infor	Functional Security Setup Information (MCO.080)
Base application setup	Infor to provide Implementation Accelerator templates and assist with mapping where applicable (e.g., FSM). Setup document will address only the	Business Blueprint (BRE.140A)	Infor	Customer	Business Data Definitions (MCO.60A)

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
	required configuration for the migration tool.				
Conference Room Pilot (CRP) Preparation Workshop	Infor leads development of the CRP Plan. Infor to deliver initial IA test cases. Specific test cases are developed and refined by Customer and used to support the CRP.	Business Blueprint (BRE.140A) Business Data Definitions (MCO.060A)	Infor	Customer	CRP Test Scripts (MCO.040A) CRP Scripts Tracker (MCO.040B) CRP Plan (MCO-040C)
Conference Room Pilot (CRP)	CRP conducted according to the scope defined in Section 1.10. Test cases are completed to record results of CRP. Application configuration issues are identified and addressed.	CRP Test Scripts (MCO.040A) CRP Scripts Tracker (MCO.040B) CRP Plan (MCO.040C) Business Data Definitions (MCO.060A)	Infor	Customer	CRP Report (MCO.050B)
Business Blueprint: updated	This work product updates the software and technology-related design scope, the future business process, and the organizational areas most affected by the solution.	Business Blueprint (BRE.140A) Business Data Definitions (MCO.060) CRP Report (MCO.050B)	Infor	Customer	Business Blueprint: updated (BRE.140A)
Construction Phase Overview The Construction Phase is characterized by Project team use of the confirmed business processes from the CRP and updated Business Blueprint, initial data conversion, user security setup, RICE development and the System Integration Test.					

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
Gap Analysis	Customer and Infor will jointly review the CRP results to determine any gaps between delivered business processes and Customer requirements.	Business Blueprint: updated (BRE.140A) Business Data Definitions (MCO.060) CRP Report (MCO.050B)	Infor	Customer	MoSCow Traceability Matrix (BRE.100A)
Application Setup	Application setup based upon the CRP results and Gap Analysis.	Business Blueprint: updated (BRE.140A)	Customer	Infor	Application Setup Information (MCO.070C)
RICE Development	Interfaces and other RICE objects required for Go-Live developed by Project team. Refer to Section 1.4- RICE Scope.	Refer to Section 1.4-RICE Scope	Refer to Section 1.4-RICE Scope	Refer to Section 1.4-RICE Scope	Refer to Section 1.4-RICE Scope
System Integrated Test (SIT) Plan and Test Scripts	Customer to create the SIT Plan & SIT scripts. Customer will leverage the CRP scripts and expand as needed to include RICE, security, and data conversions.	Application Setup Information (MCO.070C) Functional Security Setup Information (MCO.080) Refer to Section 1.3-Data Conversion Scope Refer to Section 1.4-RICE Scope	Customer	Infor	SIT Plan (TES.040) System Integration Test Scripts (TES.110)
Data Conversion-SIT	Convert historical data from Customer legacy system to Infor business applications for SIT	Refer to Section 1.3-Data Conversion Scope	Refer to Section 1.3-Data Conversion Scope	Refer to Section 1.3-Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
System Integrated Test	SIT conducted according to the scope defined in Section 1.10. Test cases are completed to record results of SIT. Customer and Infor will jointly review SIT Report to determine any discrepancies in business process design. Customer will be responsible for any manual entry for data correction.	System Integration Test Plan (TES.040) System Integration Test Scripts (TES.110)	Customer	Infor	SIT Report (TES.120E)
Transition Phase The Transition Phase is characterized by completion of final data migrations, User Acceptance Testing, End User Training, and conducting production readiness assessment, and Go-Live.					
User Acceptance Test (UAT) preparation	Customer to create the UAT Plan & UAT scripts. Customer will leverage the CRP and SIT scripts and expand as needed to include RICE, security, and data conversions	SIT Report (TES.120E) System Integration Test Scripts (TES.110) Application Setup Information (MCO.070C) Functional Security Setup Information (MCO.080) Refer to Section 1.3- Data Conversion Scope Refer to Section 1.4- RICE Scope	Customer	Infor	UAT Plan (TES.050)
Data Conversion- UAT	Convert historical data from Customer legacy system to Infor business applications for UAT	Refer to Section 1.3- Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope	Refer to Section 1.3- Data Conversion Scope

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
User Acceptance Test	UAT conducted according to the scope defined in Section 1.10. Test cases are completed to record results of UAT. Customer and Infor will jointly review UAT Report to determine any discrepancies in business process design. Customer will be responsible for any manual entry for data correction.	UAT Plan (TES.050) SIT Report (TES.120E) System Integration Test Scripts (TES.110) Refer to Section 1.3- Data Conversion Scope	Customer	Infor	User Acceptance Test Status Report (TES.150B)
Solution Training for End Users (Development and Delivery)	Development of End User training materials and delivery of training to prepare the End Users to manage their respective functions in the Infor system. Refer to Section 1.8- End User Training Scope.	Refer to Section 1.8- End User Training Scope	Refer to Section 1.8- End User Training Scope	Refer to Section 1.8- End User Training Scope	Refer to Section 1.8- End User Training Scope
Cutover Preparation	Finalize plan and schedule for cutover	UAT Status Report (TES.150B)	Infor	Customer	Cutover Checklist (TRS.060B)
Cloud Readiness Review and Report	Verify production readiness by completing a Cloud Readiness Review and subsequent Report.	UAT Status Report (TES.150B) Cutover Checklist (TRS.060B)	Infor	Customer	Cloud Readiness Review Report (IPM.135B)
Cutover/Go-Live (Final Data Conversion)	Convert Customer historical data from Customer legacy system to Infor for Production.	Cutover Checklist (TRS.060B) Cloud Readiness Review Report	Customer	Infor	Refer to Section 1.3- Data Conversion Scope System in Production (TRS.070)

Project Deliverable/ Activity	Project Deliverable/Activity Definition	Project Deliverable/ Activity Prerequisites	Primary Responsible Party	Assist	Document Controlling Deliverable Completion
		(IPM.135B) Refer to Section 1.3- Data Conversion Scope			
Optimize Phase Overview The Optimization Phase is the period immediately after Go-Live where the Infor and Customer Project teams support the end-users as they assume full ownership of the system, plan for the future, and close the Project.					
Post Live Support	Post Go-live support completed as defined in Section 1.11-.	Production Pass #4, final data migration and Cutover/Go-Live	Customer	Infor	Project Close-out (IPM.160A)

Please Note: Infor has provided an additional tab in the pricing spreadsheet to provide notes on the specific milestones requested for this project.

Deliverable Acceptance:

Upon completion or delivery of any deliverable or activity set forth in the field titled "Document Controlling Deliverable Completion" in the table above, Customer has three (3) business days ("Acceptance Period") to give Infor written notice specifying any deficiencies of such deliverable or activity against the description for such deliverable or activity specified in this Work Order in detail. Deficiencies must be substantive in nature relating to a significant potential business impact that could be caused by implementing the deliverable without a cure. Documentation related items such as: Font style, spacing, headings, page numbers, and table of contents are not considered deficiencies. If provided such notice, Infor shall use reasonable efforts to promptly cure any agreed deficiencies. After completing such cure, Infor shall resubmit the deliverable or perform the activity for Customer review as set forth above (with a new 3-day Acceptance Period beginning). Customer's acceptance shall be in writing; however, if Customer fails to provide written notice of any deficiencies (or written acceptance) within the Acceptance Period, as provided above, such deliverable or activity shall be deemed conclusively accepted at the end of the Acceptance Period.

System Development Methodology Overview

It is the Vendor's responsibility to propose a system development methodology (SDM) that is defined,documented, repeatable , and emphasizes project management best practices.

The project scope and cost should include training the WVDOT project team staff on the Vendor's SDM.The proposal should identify certifications the Vendor has received, such as Software Engineering Institute's (SEI) "Capability Maturity Model" (CMM) assessments, the International Organization for Standardization (ISO) 900x certifications, the "Institute

of Electrical and Electronics Engineers" (IEEE) Software Engineering Standards, and any other pertinent certifications.

Infor Response:

At Infor, we believe projects should be efficient, predictable, and enable continuous process improvement for our clients. To accomplish this, we have evolved our approach to projects and full lifecycle relationships with "Infor Agility." Infor will employ our Infor Agility approach for WVDOT's implementation.

Infor Agility is the client engagement model for the full lifecycle of our relationship with you. Infor Agility is the overarching approach that encompasses: the initial **engagement** with the client to address their current needs; a timely **deployment** of a proposed solution and improved business processes; confirmation of the **achievements** accomplished both during and as a result of the project; and finally, an examination of the clients **evolving** needs.

This whole lifecycle relationship approach facilitates greater project success as well as long-term post-implementation satisfaction with Infor solutions.

Figure 1: Infor Agility Approach

Infor will work jointly with WVDOT to achieve its prioritized goals through efficient, cost-effective, and well-managed resources. Because the services are just as important as WVDOT's software decision, our consulting services team engages with WVDOT's team in the same timeframe as the software demonstrations. During this time, the services team will align on the scope of business processes, business case value drivers, and WVDOT-specific reference architecture to ensure a clean, efficient transition after selection to contracting and the start of billable implementation work. We recognize that one of the worst feelings for a customer is starting the project and learning that the implementation team is unclear or misaligned on the goals, scope, or approach. Infor designed the Engage Workshops to avert that scenario and allow for adjustments before contract signing to ensure the project remains predictable and laser-focused once it kicks off.

Infor understands the need for agility in today's business climate. Customers need high value from their business software quickly. In a cloud computing environment, customers expect expedient savings from process improvements and Return on Investment (ROI).

Engage Workshop - What this means for the WVDOT

The Engage phase has allowed us to reduce the amount of time spent during the initial phase of our methodology, as much of the analysis and planning is done prior to the project starting, so we can kick off with a point of view, templates already filled out and able to hit the ground running.

In a typical Public Sector environment, organizations are challenged to bring to bear the internal resources needed for a project. Infor will work jointly with WVDOT to achieve its prioritized goals through efficient, cost-effective, and well-managed resources. During the Engage Workshops, the Infor team will engage with the WVDOT team to align on the scope of business processes, business case value drivers, and Cloud reference architecture to ensure a clean and efficient transition to the start of billable implementation work, as seen below:

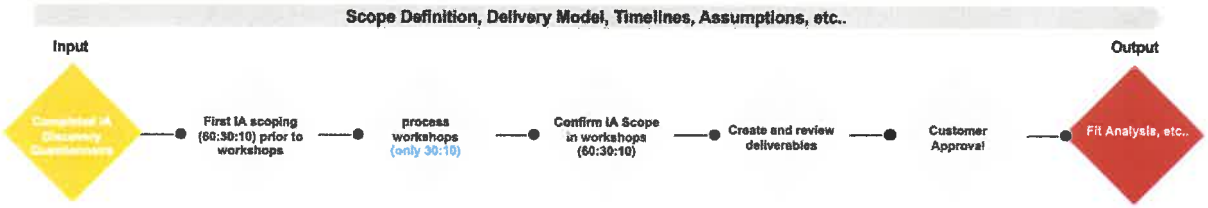


Figure 7.1 - Engagement Workshops

Infor Solution Architects will conduct a series of meetings with WVDOT process leads, to scope end-to-end processes and confirm classification of these elements as core, unique or differentiating. Our team will also perform a Master Data Element review to determine data cleansing requirements and identify key integrations and reports. We will also confirm and agree the mapping of these processes into industry specific Implementation Accelerators. These upfront agreements, prior to the creation of the statement of work, reduce decision timeframes during the project, accelerating the time to value and reducing implementation costs. For example, after confirming the fit for our migration tooling, Infor is typically able to run the first data migrations within weeks instead of months. This assessment also allows us to review the WVDOT current configuration and begin the project with a proposed GL and GHR structure. WVDOT can view the new structure with your migrated data, and tweak from there. Many of the typical design sessions are reduced or eliminated with this approach.

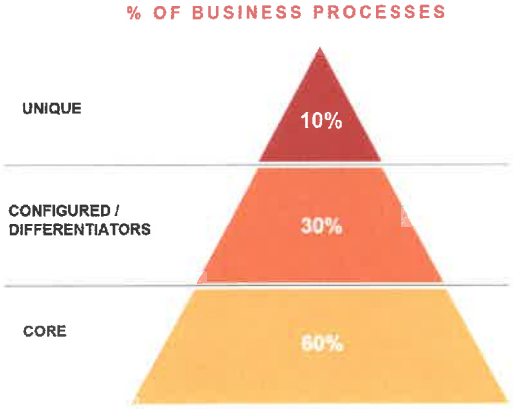
The workshop provides specific outcomes, which are:

- Process fit analysis 60-30-10 (which is described in detail below)
- Plan on a page - Executive-summary level timeline showing impact events and phasing
- Statement of work
- Reference Architecture

60:30:10™ Assessment

The core principle of Infor Agility is the 60:30:10 point of view, which is our prescriptive approach to business process adoption. Infor has analyzed how our leading clients adopted our Implementation Accelerator processes and determined that they contained a degree of commonality. This 60:30:10 approach provides value to you by eliminating or streamlining work in the implementation. The classifications of processes are shown below:

Figure 7/2 - 60:30:10 Point of View



- **60% are CORE** processes and are standard across the respective industry. Therefore, they can be adopted by most clients without any modification. Adopting these processes reduces cost and risk while bringing the organization up to the standard of process excellence. This doesn't mean a lack of options, however; our enablement process provides coaching and support for us to refine these processes. Our consultants will walk the WVDOT project team through the applicable process flows and analyze what can be adopted as-is and what level of refinement is required for the remaining scope.
- **30% are DIFFERENTIATOR** processes and have minor but important variations compared to their peers. Infor understands this and has designed configurability into these processes. There is ongoing enablement throughout the project, both our teams working together to complete the configuration, reporting, and integrations.
- **10% are truly UNIQUE** processes to the client. They drive strategic advantage for the organization and will be deeply analyzed for optimum configuration in the CloudSuite.

By classifying processes and confirming agreement on the related priorities, Infor and WVDOT are able to make more efficient use of Implementation Accelerators, relegating core processes to out-of-the-box functionality and spending valuable project effort on the unique and differentiating aspects of WVDOT's operation. Infor already has pre-built test scripts and templates for these core processes, greatly speeding up the implementation. Not only does this approach shorten the project timeline and cost, but it ensures that the resources are focused on maximum-value tasks.

Infor's Implementation Accelerators (IA)

Infor now focuses on the future state instead of starting with an "As-Is and To-Be" approach. The implementation accelerators give us a starting point for business processes reducing the amount of design time needed during the inception phase. The more of the IA business process the customer adopts the less amount of time is needed to spend on requirements gathering.

Implementation Accelerators are intended to enable industry leading practices, reduce total cost of ownership (TCO), lower project risks and deliver predictable outcomes. Implementation Accelerators include:

- A pre-established set of configurations for the application, based on industry leading practices.
- A standard set of project artifacts to be leveraged for process documentation, user manuals, training materials and test scripts.
- Menus tailored to match the daily activities of typical user roles.

Infor Implementation Accelerators make it possible for organizations to implement our solutions quickly and without major modifications while maintaining the flexibility to execute continuous improvement over the long term. Infor Implementation Accelerators provide a pre-configured framework for implementing industry-leading business processes, migrating data, establishing workflows, and educating users on the features and functionality of the solution.

Based upon your project timeline and resource availability, you'll have the flexibility to deploy the solution and use it right away or continue to refine the solution to meet your unique current or future needs. This approach can reduce and streamline the steps required for implementation, saving time and money.

The benefits include:

- Pre-configured steps which allow you to standardize processes using industry best practices.
- Customer defined implementation scope gives you a predictable project duration and costs.
- Flexibility to reconfigure and adapt the solution to meet your unique business requirements where it delivers a competitive advantage.

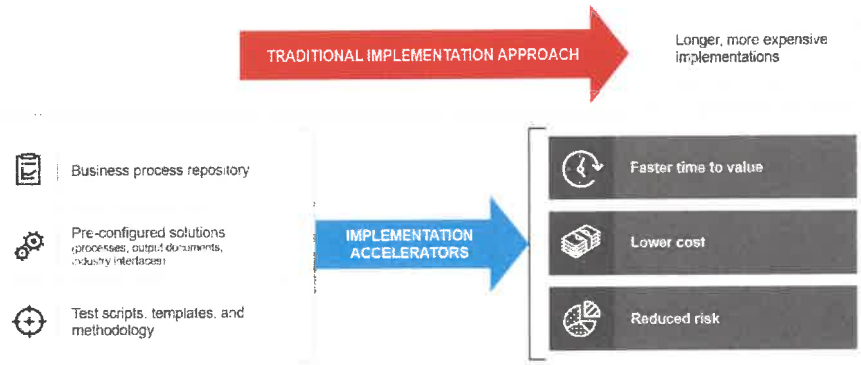


Figure 7.3 - Infor's Implementation Accelerators

Infor Deployment Method

The Infor Deployment Method will serve as the governing methodology for all deployment related work for the project. Infor Deployment Method defines what is to be delivered from the project; who is responsible for that work; and how the work is performed. Throughout the implementation there will be a gradual transfer of knowledge and ownership from the Infor Services Team consultants to the WVDOT's project team until the members of the project team become the drivers and champions of the new system and business processes.

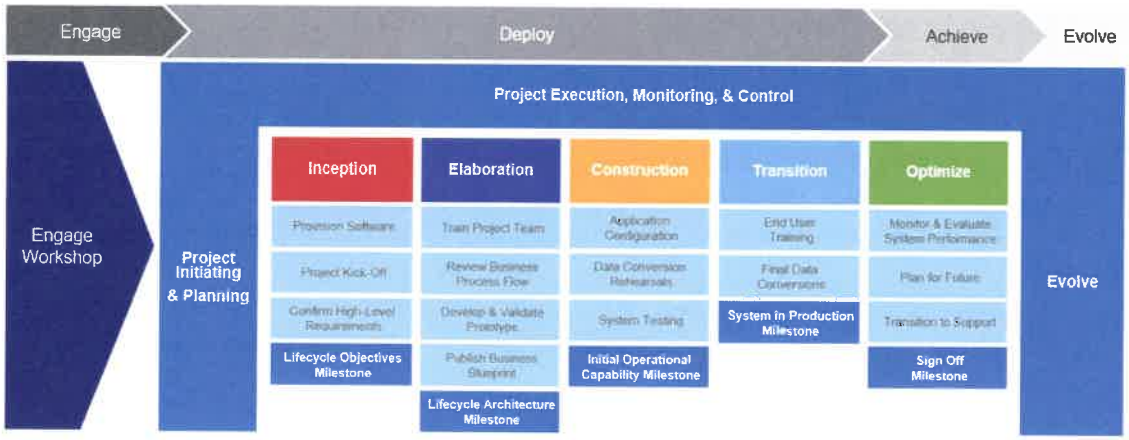


Figure7.4 -Infor Agility and Infor Deployment Method

Infor Deployment Method enables us to implement our solutions using a framework that delivers a smooth, fast, and accurate project execution. Our implementation approach is a proven, disciplined, organized methodology that is repeatable from customer to customer. Our methodology is based on years of refining and improving the steps and procedures that constitute implementation best practices.

Infor solutions are already built with functionality specific to your need, helping reduce the complexity, risk, and cost of implementation. We are constantly working to expand our ability to benefit your business in ways that other software providers cannot.

The key benefits of Infor Deployment Method include:

- **Business Process Thinking:** focus on the business benefits, not just the software.
- **Enterprise Architecture:** designing a sustainable I.T. foundation.
- **Global Rollouts:** model company definition followed by repeatable global deployments.
- **Project and Program Management:** provides structure and governance.
- **Flexibility:** methodology tasks can be combined in different way to suite to the specific needs of the organization.
- **Knowledge Transfer:** built in training and organization change management disciplines.
- **Reduced Project Risk:** address high risk items during early iterations, coupling with a focus on risk mitigation and contingency strategies.

Infor Deployment Method is comprised of five phases: Inception, Elaboration, Construction, Transition and Optimize. These Phases are defined at a high level as follows: and represented below.

- **Inception** is where the project team gathers or confirms the program requirements. Specific activities that are part of the Inception phase include:
  - Confirm Objectives and Scope
  - Define Global Deployment Strategy
  - Define Business Requirements
  - Define Supporting Requirements
  - Project Team training

- **Elaboration** is where the project team completes the Business Process flows, builds the prototypes, and validates the prototype through one or more iterations. The team also uses the Elaboration Phase to define values for various master tables within the system.

  Specific activities that are part of the Elaboration phase include:

  - Define Project Strategy
  - Build Prototype
  - Initial and Final Prototype
  - Gap Analysis
  - Analysis and Design of Custom Extensions

- **Construction** is where the project team takes the confirmed business process flows, the results of the Prototype, to configure and build the final system prior to Testing.

  Specific activities that are part of the Construction phase include:

  - Application Configuration
  - Design and Implementation of Custom Extensions
  - Unit Testing for custom extensions
  - System Testing for Infor applications and custom extensions
  - System Integration Testing for integration to external systems
  - Data Conversion Rehearsals
  - Use Acceptance Testing
  - End User Training

- **Transition** involves data conversions and user acceptance testing and concludes with a Go-Live event.

  Specific activities that are part of the Transition phase include:

  - User Acceptance Testing
  - Final Data Conversion
  - Go-Live support

- **Optimize** involves the period immediately after go-live where the project team supports the end-user and IT organization as they take complete ownership of the system, planning for the future, and winding down the project team.

  Specific activities that are part of the Optimize phase include:

  - Monitor and Evaluate System Performance
  - Plan for Future
  - Transition to Support

Milestones and Exit Points

Each of the five phases described above and illustrated below will include a milestone that represents the phase "exit" criteria:

- Inception ends with the Lifecycle Objective Milestone
- Elaboration ends with the Lifecycle Architecture Milestone
- Construction ends with the Initial Operational Capability Milestone

- Transition ends with the System in Production Milestone
- Optimize ends with the Sign-Off Milestone

Project Completion Criteria

Each phase of Infor Deployment Method ends when the milestone objectives have been met. The following table outlines the criteria by which each milestone is measured as being complete.

Phase	Milestone	Criteria
Inception	Lifecycle Objectives (LO)	• Major stakeholders agree on the scope of the proposed system • Business and system objectives are confirmed • Project scope and boundaries are defined • Project risk is identified, and mitigation and contingency plans are in place • The cost, work effort and duration of the remaining project phases are clearly defined • Baseline system architecture is defined
Elaboration	Lifecycle Architecture (LA)	• System architecture is stable and has been validated • Key configuration decisions have been determined
Construction	Initial Operational Capability (IOC)	• Business processes have been validated against the new system • Unit, system, and systems integration tests have been completed • System is ready for user acceptance testing and deployment
Transition	System in Production (SP)	• Production processing commenced and validated • Production support infrastructure has been validated
Optimize	Sign-Off (SO)	• Critical operational support issues are closed • Future enhancements have been documented • Project signed off

Successful Execution – By Design

We have read and understand that the WVDOT is seeking a Fleet and Equipment Management System to support the needs of the WVDOT Division of Highways (WVDOH) and the State Rail Authority (SRA). The Infor EAM solution will provide asset inventory/registry, work management, warranty management, planning and budgeting, modeling and analytics and management reporting capabilities in support of WVDOT fleet management operations The WV Department of Administration has been an Infor EAM user for 15 years and utilize Infor EAM for Facilities Management. Infor believes that a reliable and realistic implementation plan may be one of the biggest factors toward Infor EAM project success. With Infor Deployment Method, Infor takes the steps needed to avoid scope creep, and schedule and budget overruns. Infor Deployment Method represents a significant step toward simplifying and securing successful execution of your Infor solution.

Infor Deployment Method is designed to facilitate successful execution, every time. Developed and fine-tuned over the course of 10 years of implementations and based on best practices, Infor Deployment Method is an approach that delivers lower-risk, rapid, repeatable implementations of Infor solutions. Plus, it's scalable and flexible to accommodate a wide variety of project scenarios. It is an approach that ensures that you get only the deliverables you need for the completion of your project. No more. No less.

Project Management Methodology and Approach

The Vendor shall describe its approach to managing the project. As part of its project management approach, the Vendor should describe the project management tools, standards , controls , and procedures that are going to be utilized to create a proven, reliable process. This section should also include a brief description of the Vendor's approach for managing the project on a daily basis. The intent of this information is to provide assurance to the WVDOT of the Vendor's demonstrated ability to manage large, complex software projects such as the Fleet and Equipment Management System project in a manner thatensures quality, project success, long term viability, and lowest cost of ownership.

Infor Response:

Project Management and Team Approach

Project Management

The Project Management process within Infor Deployment Method consists of the phases, activities, tasks, work products, templates, and examples that are used to initiate, plan, manage, monitor, and control, and close all Infor projects.

The Project Management process is influenced by and rooted in the processes and best practices presented in the Project Management Institute's A Guide to the Project Management Body of Knowledge (PMBOK), Fifth Edition. Using PMBOK as a base, the Project Management process of Infor Deployment Method has transformed PMBOK's process areas into an actionable Project Management method that should be followed for all Infor projects.

Benefits of the Infor Project Management Approach

Infor's Project Management approach provides a robust capability to help facilitate the overall success of large implementations such as WVDOT's. Based on our extensive experience with EAM Fleet implementations, we believe there are several common project challenges that our Project Management Approach is designed to specifically address.

These challenges are highlighted below:

1. **Controlling Scope Creep**: Small adjustments to scope occur on every project. They come from management, WVDOT, the Project Team, suppliers, or other stakeholders. Individually, they may appear minor, but collectively these project demands can add up to a significant project expansion (referred to as "scope creep") that can overrun the allotted budget.

   Infor Project Managers understand that small scope issues add up to project delays and budget overruns. That is why the Infor Project Manager will work closely with WVDOT's Project Management Team to establish a disciplined project change management process and collaborate with WVDOT's Team to execute that process. We know the warning signs to look for and will consistently monitor and communicate these for management decision (new reports, additional interfaces, "minor" customizations).

2. **Focus on the Solution**: A Project Team can easily drift off schedule and spend too much time on the wrong tasks. This can result in a slip in project schedule and impact to overall project costs. Infor's Project Managers strive to keep the Project Team focused by using a clear and concise project charter, resolving barriers, and shielding the Team from unnecessary

interference. The Infor Project Manager will keep clear view to charter, scope, work plan and redirects when the Team is getting off target or diving too deep in a given area.

The Infor Project Manager will have a close association with Infor development, product management and support, and work to build effective team dynamics between the Infor and client resources. Team chemistry between the WVDOT Project Team and Infor is an important focus for the Infor Project Manager – therefore, the Infor Project Manager will ensure that the right team is in place to position the project for success, and that the right players are in place at the right time.

3. **Define the Critical Path to Optimally Complete the Project**: Every project is made up of a series of connected activities, each of which has its own constraints. The Infor Project Manager identifies the critical path of activities — that is, the optimal sequence of actions that best facilitates the project's successful completion. Infor Project Managers experience and track record of success allows for anticipation of risks and their mitigation before they turn into issues. Learning from past challenges allows for optimal use of critical knowledgeable resources and minimizes the non-value add time spent for critical client resources.

   Using Infor's proven Project Management Methodology and years of similar project experience, the Infor Project Manager will provide a clear path to the EAM Fleet system Go-Live.

4. **Obtain Project Buy-In from Disparate Groups**: As President Lincoln once said, "Public sentiment is everything. With it, nothing can fail; without it, nothing can succeed." The Infor Project Manager uses the tools in the Initiating and Planning Phase of Project Management to collect user requirements and project constraints to build a strong business case justification. Using input from various sources of the project participants, the Infor Project Manager strives to overcome dissent and obtains buy-in by communicating the project benefits as the different stakeholder groups see them.

   Infor's Project Managers' access to multiple levels of management enables effective escalation when necessary. Alignment with the WVDOT Project and Infor's Executive Management allows for identification of issues and solutions from all levels of both companies.

5. **Communicate Project Progress, Risks, and Changes**: As a project progresses, stakeholders must be kept informed of the outcomes, changes, stumbling blocks, or successes that the project experiences. The Infor Project Team, with the guidance of the Infor Project Manager, will create a project Communication Plan to address these common communication challenges, provide a format for discussion, and lay out a process for resolution.

   The Infor Project Manager should be the primary source of all project communications from the Infor Project Team. The Infor communications plan is a proven medium for keeping all parties on the "same page". In cases where the Infor Project Manager works with a peer on the client side, the Infor Project Manager is the one-stop shop for all Infor communications (from the Business Consultants to Infor Senior management, support and development teams as needed.

6. **Prepare for Unexpected Project Issues**: Every project runs into unforeseen issues. Infor's experienced Project Managers plan for the unexpected by lining up alternative courses of action early – during the Initiating and Planning Phase! Based on our experience of implementing Infor solutions, the Infor Project Manager has a Plan A, B and C for achieving project milestones.

   Infor's value-add is being prepared to make adjustments based on the personal experiences of the Infor Project Manager and the community of fellow Infor Project Managers.

7. **Deliver Project Results On Time and On Budget**: Project Planning starts with a well thought out business case justification that includes cost calculations associated with the potential return. Once these measures are established, it is up to the Project Manager to ensure that on-time, on-budget performance is maintained; otherwise, the project will never produce the expected results. That's what good Project Management is all about!

   Infor Project Managers know the consultants and products and have experience implementing Infor's software successfully. Learning's from similar projects and challenges enable on time and on budget results based on track records of previous success. In addition to the success of the

project, Infor Project Managers are also responsible for the success of the practice; thus, in addition to meeting client expectations, the Infor Project Manager will need to meet Infor KPIs. Schedule and Budget performance and WVDOT satisfaction are critical KPIs. Our future success in the market depends on each client's success.

Project Management Phases

The Project Management process of Infor Deployment Method is organized into a hierarchy of phases, activities, and tasks. The phases for Project Management overlap and span the phases used within the Implementation process. The activities are logical, sequential groupings of tasks that are generally executed in order. The tasks are where the bulk of the Project Management work is performed. Within Infor Deployment Method, detailed guidance is provided for each of the Project Management tasks. Each task creates an output, known as a work product. Work products fall into three categories: deliverables, artifacts, and outcomes.

- **Project Initiating and Planning**. The purpose of this phase is to formally start or initiate the project, plan the project, and establish the foundation to deliver the project objectives. The project is transitioned from the sales process, and the Project Manager establishes the project processes and tools, confirms a common understanding of expectations with the client, and comprehensively plans the project's execution and management.
- **Project Execution, Monitoring, and Control**. In this phase, the project work is managed and delivered. The Project Manager oversees the entire project and performs Project Management tasks to deliver each component of the project according to plan, monitors the project for deviations from the plan, and controls project performance. This includes measuring and reporting on project performance and controlling and correcting deviations from the plan.
- **Project Closure**. The purpose of this phase is to formally close the project or any delivery phases of the project. The Project Manager ensures client acceptance of the project, closes out each component of the project with the client, and completes an internal transition to close and archive the project for Infor.

Project Management Activities

The following diagram shows the three phases of the Project Management process, along with the key Activities within each phase:

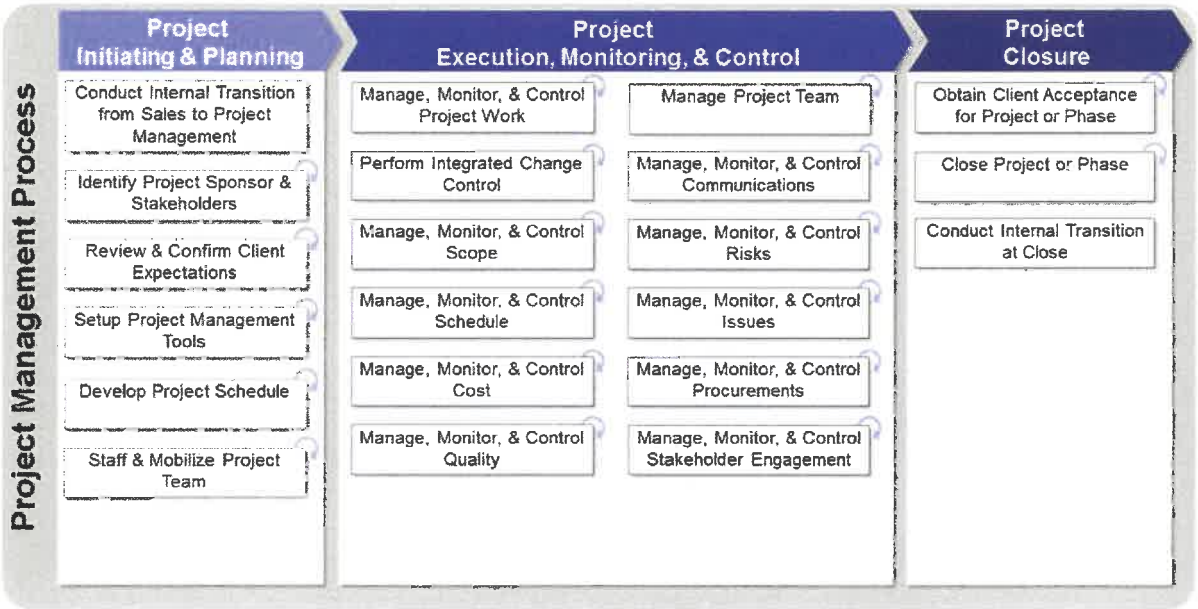


Figure 7.5 - Activities

Project Management

Detailed Responsibility by Phase Descriptions

Project Initiating & Planning

Project Initiating & Planning

The purpose of this phase is to formally start or initiate the project, plan the project, and establish the foundation to deliver the project objectives. The project is transitioned from the sales process, and the Project Manager establishes the project processes and tools, confirms a common understanding of expectations with the EAM Fleet Project, and comprehensively plans the project's execution and management. Each of the Project Initiating and Planning Activities are highlighted below:

- **Conduct Internal Transition from Sales to Project Management:** This activity reviews the materials that were created during the sales process. The Project Manager is often staffed after the sales process is completed and after the contract & SOW have been signed. This activity transitions the project from sales to Project Management. It allows the Project Manager to review the materials that were created during the sales process so that he or she understands the project context, objectives, constraints, and contractual obligations. This activity is an internal transition and review performed by the Project Manager and supported by the Bid Manager and Infor Project Sponsor.
- **Identify Project Sponsor & Stakeholders:** This activity identifies and confirms the Client Project Sponsor and key project stakeholders. The purpose of this activity is to identify and understand the key stakeholder groups of the project, including the Client Project Sponsor, who is also often the project buyer.
- **Review & Confirm Client Expectations:** This activity reviews and confirms the contract, SOW, and expectations with the client. The purpose of this activity is to confirm a common understanding about the project, client expectations, and project parameters and delivery with the client.
- **Setup Project Management Tools:** This activity establishes any tools that are needed to support Project Management and fulfill the Project Management activities Most projects will require some Project Management tools to support their execution. The most common are logs (such as the risk log), time and expense recording tools, document management tools, and team collaboration tools. In this activity, the project sets up all Project Management tools that are specified or required to meet Project Management requirements.
- **Develop Project Schedule:** This activity creates the actionable and trackable schedule for the project. The Project Schedule is used throughout the project to specify and measure project milestones and delivery dates. This activity creates and baselines the schedule.
- **Staff & Mobilize Project Team:** This activity identifies, evaluates, and confirms resources to the project team. Every project is dependent on its team to deliver the project work. The purpose of this activity is to staff the project team that is required to deliver the project objectives.

Project Execution, Monitoring, & Control

Project Execution, Monitoring, & Control

The purpose of this phase is to direct and manage the project and its components, monitor the project for deviations from the plan, and control project performance. In this phase, the project work is managed and delivered. The Infor Project Manager oversees the entire project and performs Project Management tasks to deliver each component of the project according to plan, monitors the project for deviations from the plan, and controls project performance. This includes measuring and reporting on

project performance and controlling and correcting deviations from the plan. Each of the Project Execution, Monitoring, and Control sub-disciplines are highlighted below:

- **Manage, Monitor, & Control Project Work:** This activity manages, monitors, and controls project work. The purpose of this activity is to apply Project Management discipline to the delivery of project work.
- **Perform Integrated Change Control:** This activity manages the integrated change control process for the project. The purpose of this activity is to manage and control change on the project.
- **Manage, Monitor, & Control Scope:** This activity manages, monitors, and controls project scope. The purpose of this activity is to apply Project Management discipline to project scope.
- **Manage, Monitor, & Control Schedule:** This activity manages, monitors, and controls the project schedule. The purpose of this activity is to apply Project Management discipline to project schedule.
- **Manage, Monitor, & Control Cost:** This activity manages, monitors, and controls project cost. The purpose of this activity is to apply Project Management discipline to project cost.
- **Manage, Monitor, & Control Quality:** This activity manages, monitors, and controls project quality. The purpose of this activity is to apply Project Management discipline to project quality.
- **Manage Project Team:** This activity manages, monitors, and controls the project team. The purpose of this activity is to apply Project Management discipline to the project team.
- **Manage, Monitor, & Control Communications:** This activity manages, monitors, and controls project communications. The purpose of this activity is to apply Project Management discipline to project communications.
- **Manage, Monitor, & Control Risks:** This activity manages, monitors, and controls project risks. The purpose of this activity is to apply Project Management discipline to project risks.
- **Manage, Monitor, & Control Issues:** This activity manages, monitors, and controls project issues. The purpose of this activity is to apply Project Management discipline to project issues.
- **Manage, Monitor, & Control Procurements:** This activity manages, monitors, and controls project procurements. The purpose of this activity is to apply Project Management discipline to project procurements.
- **Manage, Monitor, & Control Stakeholder Engagement:** This activity manages, monitors, and controls project stakeholder engagement. The purpose of this activity is to apply Project Management discipline to project stakeholder engagement.

Project Closure

The purpose of this phase is to formally close the project or any delivery phases of the project. The Infor Project Manager receives client acceptance of the project, closes out each component of the project with the client, and completes an internal transition to close and archive the project for Infor.

- **Obtain Client Acceptance for Project or Phase:** This activity obtains the client's acceptance for delivered phases and the overall project. Before a phase or project can be closed, the project should obtain the client's acceptance. The purpose of this activity is to record the client's acceptance of a completed phase or the overall project.
- **Close Project or Phase:** This activity formally closes the phase or project. This activity is performed both at the end of phases and at the end of the project. At the end of this activity, the phase or project should be completed and fully closed. There should be no outstanding client work or management of the phase or project at the end of this activity.

- **Conduct Internal Transition at Close:** This activity performs Infor internal closure tasks to document the closed project and transition it to archives. When the project ends at the client, Infor gathers, documents, and archive key project information, including the Go-Live Report, the customer satisfaction survey, the client's permission to be used as a reference, project documentation, and project lessons learned. This internal closure activity transitions the project from the client site into Infor records.

Project Management Sub-disciplines

Based on our extensive experience in managing large projects such as this, the Project Management process of Infor Deployment Method has been broken down into a number of disciplines. This approach allows the complex task of Project Management to be better planned, communicated, and executed through discrete disciplines. Each of which can then be defined in greater detail, tracked more efficiently, and integrated into the project's master project schedule.

Discipline	Description
Communications Management	This discipline includes the tasks that manage the required communications for the project. The tasks in this discipline are focused on planning, managing, controlling, and closing project communications.
Cost & Financial Management	The tasks in this discipline ensure the project is delivered according to cost (customer) and financial requirements (Infor). The tasks in this discipline are focused on planning, reviewing, budgeting, managing, controlling, and closing the project costs and financial management. In this discipline, cost management refers to standard project cost management; it deals with the project as a cost center to the client, including all client-facing project processes to manage the project's costs and expenditures. Financial management deals with the project as a profit center for Infor and refers to any Infor internal processes to manage the financial performance of projects, including client invoicing, managing revenue and margin, and Infor internal financial reporting.
Human Resource Management	This discipline includes the tasks that enable the management of the human resources assigned to the project. The tasks in this discipline are focused on planning, staffing, orienting, training, managing, evaluating, improving, and closing the Project Team.
Integrated Project Management	This discipline includes the tasks that unify and centralize Project Management for the project. These tasks drive overall management, planning, execution, monitoring, control, and closure on the project. This discipline ensures all other aspects of the project are completed. Tasks that overlap or unify multiple disciplines as well as tasks that do not fit in any other discipline are consolidated within this discipline.
Issue Management	This discipline includes the tasks that manage project issues. These tasks are focused on planning, performing, and closing issue management and identifying, assessing, controlling, and closing project issues.
Procurement Management	This discipline includes the tasks that conduct and manage procurements for the Infor Project Team, and are focused on planning, reviewing, conducting, controlling, and closing project procurements.
Quality Management	This discipline includes the tasks that ensure the project is

	delivered according to quality requirements. These tasks are focused on planning, managing, assuring, controlling, and closing quality for the project.
Risk Management	The tasks in this discipline enable the proper management of project risks, and are focused on planning, performing, and closing risk management, and identifying, assessing, controlling, and closing project risks.
Schedule Management	Schedule Management tasks ensure the project is delivered according to the required schedule. These tasks are focused on planning, reviewing, managing, controlling, and closing the project schedule.
Scope Management	Tasks in this discipline ensure the project contains and completes all of the required work, and only the required work, to successfully deliver the project. The tasks in this discipline are focused on defining, planning, managing, controlling, obtaining acceptance for, and closing the project scope.
Stakeholder Management	This discipline's tasks manage project stakeholder engagement, and are focused on identifying, confirming, and assessing stakeholders, and planning, managing, controlling, and closing stakeholder engagement for the project.

Detailed Description of Services/Deliverables to be Provided

The Vendor should describe in detail how each of the services listed in Section 4.2.2. shall be provided inaccordance with the Vendor's methodology.

Infor Response:

Our responses to many of the items in Section 4.2.2 have been addressed throughout this document in response to questions most specific to those topics. Those topics without its own question have been addressed below.

Testing

Testing is an important aspect of the project implementation. We have provided a sample test plan below.

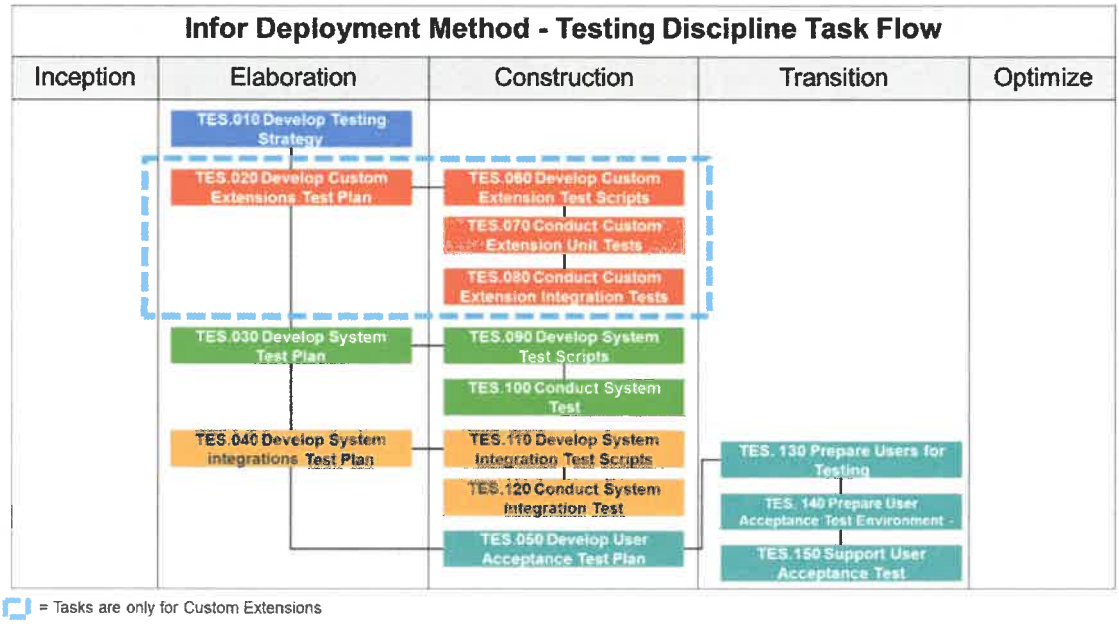


Figure 7.6 - Testing

TES.010 – Develop Testing Strategy

Testing Strategy determines the approach that the project will follow for testing. The strategy considers the characteristics of the system to be built, the project duration and budget, and defines the strategy to complete the testing scope and level of rigor for the effort.

TES.070 Conduct Configuration Extension Unit Tests

This task performs unit tests on configuration extensions that have been developed during the project. Unit testing validates that the individual configuration extensions are fit-for-use and function as expected per the relevant technical specifications.

Custom Extension Unit Test is usually performed in parallel with development. The Developer typically performs this task, and he or she conducts the tests according to the Custom Extensions Test Scripts and documents the output as the Custom Extension Unit Test Results.

TES.080 Conduct Configuration Extension Integration Tests

This task performs integration tests on custom extensions that have been developed during the project. Integrations testing validates that the custom extension units are functioning together as expected per the relevant functional specifications.

Configuration Extension Integration Test is usually performed in parallel with development. The Developer typically performs this task, and he or she conducts the tests according to the Custom Extensions Test Scripts and documents the output as the Configuration Extension Integration Test Results.

TES.100 Conduct System Test

This task executes System Test in the appropriate System Test environment. System Testing tests the standalone integrated system, and it validates the functionality of the system against the specified requirements. System Test should imitate how end-users would use the system, and the Tester should document any errors as problems or defects.

System Test should be performed according to the System Test Plan and using the System Test Scripts. This task produces the System Test Results.

TES.120 Conduct System Integration Test

This task tests the system within the context of the other systems with which it will interact. System Integration Testing validates the interfaces and interactions between the implemented system and other client systems within the client's environment. This task should validate integrated system interactions, whether the implemented system is interfacing with other Infor products or client legacy systems.

The Tester should document any errors found during testing as problems or defects. The output of this task is the System Integration Test Results.

TES.150 Support User Acceptance Test

Unlike the other testing tasks, User Acceptance Test is performed by client users instead of members of the Infor project team. The client users are new to the system. Although they have been prepared to participate in User Acceptance, they may have questions or need support while validating the system. This task provides user support to client testers to help ensure they are able to complete system validation during User Acceptance Test.

As indicated in each phase, testing is a critical component. The various different aspects of testing are defined below. The Infor software is configured as individual "components", but the deployment of the entire system will be done to ensure that the system is tested as a single unit.

Integrated System Testing

Integrated System Testing deals with testing the integrated system that has been deployed into an environment as a single solution. Emphasis is placed on the functionality, performance and capacity of the system related to conformance to requirements and fitness of purpose, in addition to the overall system integration different components. The system is judged against user requirements, code specifications, business functionality, scalability, reliability, and hardware performance. Ideally, some amount of testing should be completed using pristine data that has been entered using the application. In this way, functional issues can be determined and resolved independent of any issues that result from converted data. After the clean data test is completed, the Integrated System Testing environment can be continued using converted data to test the quality of the conversion, and to stress the business functionality further. The basic steps of the Integrated System Test are as follows:

- **Script Identification** – Using the Solutions Design Documents, test scripts are identified that test the individual requirements of the system.
- **Script Creation** – Each of the scripts that have been identified above will be written, with basic steps on how to execute the functionality, in addition to inputs and expected results.
- **Script Execution** – The scripts that have been written are executed, the results recorded, the script is passed or failed, and any associated defects are written.

In addition, some of the SME power users may engage in "Structured ad hoc Testing". This type of testing involves users with advanced skillsets and deep business knowledge to traverse the system as they would during normal business operations, essentially trying to "break" the system.

The following tests are also part of the IST testing process:

- **Data Conversion Test** – This test activity includes testing the converted data in two basic ways. The first way is to produce reports that validate various "checksum" characteristics of the converted data, such as the total number of assets (or licenses, or bills, etc.), and then, subdividing the assets (or licenses, or bills) by type, by class, by fee type, by bill type, etc. Checking these statistics on pre and post converted data to validate that all data has been correctly converted. The second type of testing is to perform basic functional testing with the application using converted data. This should be performed after the functional testing listed above has been completed with pristine data to ensure that functional issues aren't confused with conversion related issues.

- **Interface and Batch Test** – This test activity includes testing the inbound and outbound interfaces for validity, data integrity, and timeliness. Batch processes with all frequencies must also be tested for timeliness and accuracy. (Batch testing frequently involves interface testing as many interfaces are completed during a nightly batch cycle.)
- **Performance & Capacity Testing-** Performance testing is done to provide stakeholders with information about their application regarding speed, stability, and scalability. Infor will work with WVDOT during the Phase 0: Mobilization to determine the applicable testing metrics based on the methodology below.
    1. **Identify testing environment -** Know the physical test environment and production environment. Understand details of the hardware, software and network configurations used during testing before beginning the testing process.
    2. **Identify the performance acceptance criteria -** This includes goals and constraints for throughput, response times and resource allocation. It is also necessary to identify project success criteria outside of these goals and constraints.
    3. **Plan & design performance tests -** Determine how usage is likely to vary amongst end users and identify key scenarios to test for all possible use cases. It is necessary to simulate a variety of end users, plan performance test data and outline what metrics will be gathered.
    4. **Configuring the test environment -** Prepare the testing environment before execution.
    5. **Implement test design -** Create the performance tests according to your test design.
    6. **Run the tests -** Execute and monitor the tests.
    7. **Analyze, tune and retest** - Consolidate, analyze, and share test results. Then fine tune and test again to see if there is an improvement or decrease in performance. Since improvements generally grow smaller with each retest, stop when bottlenecking is caused by the CPU. Then Infor will make the recommendation for WVDOT to increase CPU power.
- **User Acceptance Testing** – User Acceptance Testing is designed to allow the end users of the new system to test based more on daily business workflows and processes, rather than on conformance to requirements. UAT may leverage the scripts that have been created within IST, but should align more closely with the daily work activities of the end users. This would include line workers, approvers, managers, team leads, field organizations, etc. As with IST, any automated interfaces or nightly batch jobs should also be included within the test scripts and should just follow what normally happens during a typical business cycle. New functionality may require specific scripts to be written as some functional capabilities will be new to the end users.
- **Defect Management and Resolution** – Defects will be investigated based on priority and/or severity, and also based on the number of other defects that are currently being worked. A defect resolution process will be established prior to the testing phase in order to formalize how quickly a defect is addressed. Turnaround times for defects vary based on the complexity of the defect, how easily repeatable it is, and how many other defects are being worked by the project team. Turn times for defects will be tracked and analyzed during the testing phases in order to assist with planning of retests, and validation of the overall testing schedule.

Documentation - Project Documentation

Infor's goal is to build an environment that is sustainable, maintainable, and upgradeable to facilitate the WVDOT's full utilization of industry leading technology. To accomplish this, Infor believes that documentation and the use of project control tools is the key to understanding, implementing, and managing all project requirements. Infor's Deployment Methodology, used to approach every implementation and upgrade project, incorporates the production and updating of project documentation as a core competency. It is the discipline of Infor's approach to project control tools and documentation which facilitates project success.

To document the processes that we will be following on the project, as well as the requirements to be configured in support of the standardized business process, Infor may complete the following

deliverables during the project duration so that WVDOT is left with a supportable and sustainable Infor EAM environment.

The documents that can be delivered include:

- Status Reports
- Implementation Plan (includes Project Plan)
- Meeting Minutes
- Decision Memos
- Communication Plan
- Project Charter
- Project Management Plan
- Kick-Off Meeting Presentation
- Change Management Plan
- Risk Mitigation Plan
- Risk List
- Test Plan and Test Scenarios
- Change/Defect Backlog
- Training Plan
- Training Materials
- Environment Configuration
- Project Assessment
- Risk List
- Functional Requirements/Gap Analysis
- Asset Hierarchy
- Data Collection Templates
- Data Mapping and Migration Plan
- Integration Requirements and Transaction Flows
- Business Process and Work Flows
- Organizational Change Plan
- Migration/Deployment Plan
- Migration Test Results
- Configuration List
- Project Close-Out Report

System Support Services

Standard methodology for developing a business continuity plan, continuity capabilities and high- availability infrastructure, as well as a detailed explanation of the related approach, activities, procedures, tools, and templates and how the Vendor manages these activities and leverages the tools and templates.

Infor Response:

Yes, Infor maintains Business Continuity Plan (BCP) / Disaster Recovery (DR) documentation for our Cloud applications. BCP/DR outlines processes and procedures to be followed in the event our Cloud applications must be recovered from backup as the result of a catastrophic failure. Infor Cloud

Operations personnel review and update the DR documentation on a regular basis, and testing is conducted on reference application deployments on an at-least-annual basis.

Infor has architected our multi-tenant Cloud solutions to eliminate single-points-of-failure, up to and including full data center failures, by distributing all resources required for delivery of the Cloud application services across fully redundant physical infrastructure within the datacenter, and across multiple physical datacenters within an Amazon Web Services (AWS) Region. In the event of a catastrophic datacenter failure (which would trigger a Disaster Recovery activity in a traditional application deployment), all application load automatically and seamlessly transfers to one of the other datacenters in the region. At worst, users will be required to reauthenticate themselves, and will then continue working where they left off.

Infor leverages the services of Amazon Web Services (AWS) to provide the infrastructure in which the fully managed solution is hosted. AWS maintains data centers in geographically disperse data centers for redundancy. The Backup data is replicated within the same region of provisioning on AWS (between Availability Zones).

Infor has partnered with Amazon Web Services (AWS) to provide data center hosting services. AWS provides multiple Availability Zones (AZ) in the same region, which are in essence separate data centers across various geographic regions. These multiple AZs support high-availability, fault tolerance, and seamless failover capabilities. Example: should AZ1 go down, AZ2 and AZ3 would pick up the load. At the same time, a new instance will be created to ensure that there are 3 AZs again.

Disaster recovery guidance and execution (if necessary) for the duration of the project in accordancewith the WVDOT's disaster recovery plan.

Infor Response:

Infor has its own disaster recovery policy. Infor has architected our multi-tenant Cloud solutions to eliminate single-points-of-failure, up to and including full data center failures, by distributing all resources required for delivery of the Cloud application services across fully redundant physical infrastructure within the datacenter, and across multiple physical datacenters within an Amazon Web Services (AWS) Region. In the event of a catastrophic datacenter failure (which would trigger a Disaster Recovery activity in a traditional application deployment), all application load automatically and seamlessly transfers to one of the other datacenters in the region. At worst, users will be required to reauthenticate themselves, and will then continue working where they left off.

Performance tuning of databases, application servers, web servers, and other software and devices deployed as part of the proposed solution. This includes batch and online software tuning, as well asdata conversion software tuning; and

Infor Response:

The service (Software as a Service – SaaS) will be scaled automatically by Infor to maintain optimal performance levels. Infor relies on Amazon Web Services (AWS) sophisticated infrastructure, platform, and services to scale automatically and to virtually infinite capacity in response to workloads to ensure optimal performance. Based on over 10 years of cloud EAM monitoring and tuning experience, Infor has optimized the EAM deployment on AWS to align auto-scaling resources (e.g., compute, storage, user authentication) with key EAM processes sensitive to increased workloads in peak periods. Furthermore, our multi-tenant architecture maintains excess capacity sufficient to support demand spikes for all tenants until additional resources are auto-provisioned (in minutes). Each tenant enjoys the benefit of this available excess capacity to accommodate peaks without impacting users. This is a key scalability advantage of Infor's multi-tenant cloud architecture. Amazon will be responsible for providing connectivity between user locations and the AWS data. (Note, other Amazon users have observed acceptable low latency utilizing Amazon's corporate network between facilities and AWS data centers.)

The Cloud Operations team uses several different monitoring tools to ensure application and environment availability. This includes application monitoring, system monitoring, and database access monitoring among others. The proposed solution auto-scales to ensure adequate resources

are available all the time, even as peak month- and quarter-end jobs are executed. Additionally, the Infor Cloud Operations teams continually monitor the health and performance of all system components to ensure that system limits can be expanded proactively (storage, for example). All aspects of Capacity Management are included as part of the standard solution.

Infor application and database servers are installed across multiple Availability Zones (AZ) to provide the highest availability possible. If a data center or AZ partially or completely fails, the workload is automatically redistributed across the other AZs within the region by the AWS Elastic Load Balancers (ELB) and Auto Scaling services. Relational database servers employ synchronous or near-synchronous replication to duplicate data in multiple AZs to minimize or eliminate any transaction loss due to a system, data center, or AZ failure.

Software upgrade methodology

Infor Response:

Infor's SaaS offering is subject to regular scheduled maintenance windows, these are mostly utilized to conducts upgrades and patch installations to keep up to date with the latest technology standards. These maintenance schedules are positioned accordingly to minimize the impact on local business hours. Maintenance patches are released monthly as needed.

Infor alerts clients that an upgrade is available through a notice sent via Infor Support portal. Clients are notified at least 24 hours prior to a new release. Fixes/Patches/Upgrades cannot be ignored because they are deployed to all customers and all customer environments on the same instance at the same time, as there is only a single code-set shared by all tenants on a given instance. Configuration changes stay within the Infor EAM application and are not lost when WVDOT upgrades to a new release.
Infor releases a new major version of Infor EAM on average once a year. All active customers are eligible to upgrade to enhanced software releases. In developing each release, customer needs and requests are considered and, when possible, addressed with new functionality or enhancements. This process is an ongoing one as Infor continues to develop the EAM solution to meet emerging customer requirement and specific industry standards.

Client satisfaction, reception to and use of our product line is extremely important to Infor. Therefore, we get much of our information for future upgrades from the avenues described in the following list:

- **Annual User Conference -** Once each year Infor holds 3-4 days of conference for customers and partners. Material includes such topics as Executive briefings, industry trends, software training, computer labs, and specific topics.

  Inforum 2021: Will be held at CAESARS FORUM in Las Vegas, NV November 9-11, 2021.

- **Regional User Groups** – Conducted in various locations across the United States and Internationally. We facilitate the first meeting; however, the objective of these sessions is to allow customers to conduct the meetings themselves, with continued guidance and support provided by our company. We provide technical and services resources to meet and provide insight as requested.

- **Technical Support and Project Management Divisions** – We solicit information from both of these groups regarding specific need encountered in the field, and most commonly asked questions.

- **Special Interest Groups** – These groups are formed in response to a specific feature requirement. The groups exist for the purpose of creating a Business Requirement Specification, which is then turned into a product feature by the development group. Recent examples are a Risk-Based Inspection feature, which encompassed several major oil companies who use it for offshore inspections of their exploration equipment. Another example deals with the electronic signature aspect of 21CFR Part 11, which involves several pharmaceutical companies.

  Customer Advisory Council – User driven group, facilitated by our product development and services representatives. Attendees are selected by the CAC executive committee, which is

elected by the CAC. The selection criteria include such items as 1) participation and interest in technology and maintenance management initiatives, 2) industry representation. CAC meets quarterly to discuss business, technology, and marketplace issues. CAC provides a forum for key-account customers to interact closely with our Senior Management.

Infor collaborates with clients and seeks their feedback, in regard to continued improvement of our solutions, regularly in user groups, conferences and via other formal processes. We intend to continue the design, development and deployment of industry-specific products and technologies that maximize ease-of-use and provide a lower total cost of ownership for customers by saving them time and resources during implementation. To maximize the benefits of our industry-specific solutions, we complement our industry expertise through our professional services organization and strategic relationships with key partners.

Lessons Learned

The Vendor should provide a discussion of the significant lessons learned from experience at previousprojects of similar size and scope, and how the Vendor plans to apply those lessons to the Fleet and Equipment Management System project.

Infor Response:

There are many factors WVDOT should consider to ensure a **successful** procurement and implementation of an EAM solution. Please find a list of our suggestions below. The WVDOT may already be considering these items, however, it is always good to re-enforce the concepts.

- Plan for organizational change before the RFP and over communicate to those affected by the new EAM solution without over-promising.
- Executive buy-in is always critical for client and project success. Executive buy-in and commitment throughout the organization is critical in order to drive change and behavior. We propose an Executive steering committee composed of client and vendor executive staff that will meet periodically throughout the project life. Executive champions/sponsors must be willing to demand and orchestrate organizational change and be willing to seek changes in statute, contracts, and traditional "ways of doing business" in exchange for doing things in the manner delivered by the software.
- Limit Customizations. There must be a willingness to change processes as opposed to modifying the software to work the way WVDOT currently does things.
- Have the manufacturer of the software involved in the implementation. No firm has more at risk in the success than the software provider as that relationship lives on forever. Many system integrators do not do a perfect job of implementing, hence unforeseen results occur, not using the latest tools for example or understanding of the latest functionality, etc.
- Define Agency Staff Assignments. Defining the vendor / agency staffing ratio is critical for the agency—and the vendor/ implementation team. The agency should select some of their best staff throughout the organization and assign them full-time to the project for the lifecycle. A common mistake is the assignment of some of the weaker members of the agency team which hurts the project in terms of their credibility and driving change throughout the organization. Also, the part time assignment of agency staff will hurt the project. When staff have two jobs something always falls through the cracks—usually the new implementation.
- Vendor staff constraints. Beware of vendors who will not be able to properly staff your project if selected.
- The EAM solution program and project scope should be approved, published, and managed with project expectations that are realistic and sustained. Infor works closely with our agencies prior to formal project initiation to develop and document an agreed-to scope that includes realistic expectations and clear documentation of responsibilities. Infor's approach is to work collaboratively with our client agency's leaders and governance board to manage the project against this scope and set of expectations.

- Building a mutually agreed-to change control process consistent with an agency's requirements is important. Infor provides processes and support for managing risk and change via our Infor Deployment Method.
- It is critical that the project team has the required skills and knowledge, and that they are available to the project as required. Infor staffs our projects with consultants who have the necessary product and industry knowledge. We will craft a detailed learning strategy designed to educate your project team members on our solution, tools, and methodology so that they can effectively perform their project responsibilities. Infor's consultants will work side-by-side with the WVDOT's team throughout the any implementation or educational engagement to transfer their knowledge of our Infor Public Sector solution and best practices to WVDOT personnel.
- It is important that the implemented solution is sustainable once WVDOT's EAM solution is deployed. During the project Infor consultants will guide WVDOT "armchair to armchair" on the alternatives and recommended approaches to meet your requirements most easily and cost effectively with a focus on utilizing proven best practices within our solution. We strive to avoid unnecessary modifications and customizations of the software to make it as easy to maintain as possible using the knowledge your team has gained during the project.
- Select an EAM Solution vendor that is actively focused on the needs of the Public Sector market and is impressing third party analysts. Gartner recently classified Infor as both positive and promising in their latest Vendor Report. The report focused on Infor's commitment to the marketplace and to our product strategy. In addition, they praised Infor on our industry verticals, which allow us to bring more focus to unique industries like Public Sector.

8-Responses to State's Goals and Objectives

The Vendor shall complete the responses to each of the State's goals and the objectives identified in Section 4.2.1. Vendors shall describe how they will comply with each. The completed response should beinserted in the Technical Proposal in TAB 8.

4.2.1.1 Vendor's proposal should provide an architectural design based on the capacity and storage requirements listing in this RFP. The proposal should include a description of the methodologythat will be utilized to size, plan, and execute the implementation of a turnkey solution.

Infor Response:

Infor provides a fully hosted and fully managed SaaS solution that covers all technical aspects of the application deployment, including infrastructure monitoring, hardware sizing, operating system refreshes, capacity management, performance and load balancing, networking connectivity and security monitoring. Infor leverages Amazon Web Services (AWS) to provide the infrastructure in which the fully managed solution is hosted. Infor solutions include a set of system, application, database, and infrastructure installation and support services. These include application and hardware administration, patch management, database and operating system management, performance monitoring, backup and recovery, and proactive health checks. **There are no actions required by WVDOT to install hardware or manage the database.**

Infor EAM involves a multi-tier architecture comprised of the client tier, presentation tier, web service tier, business logic tier, and database tier; and any of the commonly used internet browsers can be used for connecting to the solution on the application server. Unlike most business software, the underlying database was not designed by software developers, but rather database scholars of Codd's relational database design. The entire database is in at least 2NF and mostly 3NF where appropriate. The naming conventions of database tables and attributes makes aliases unnecessary and makes join properties intuitive. Detailed architecture documentation is only available with approved, signed NDA.

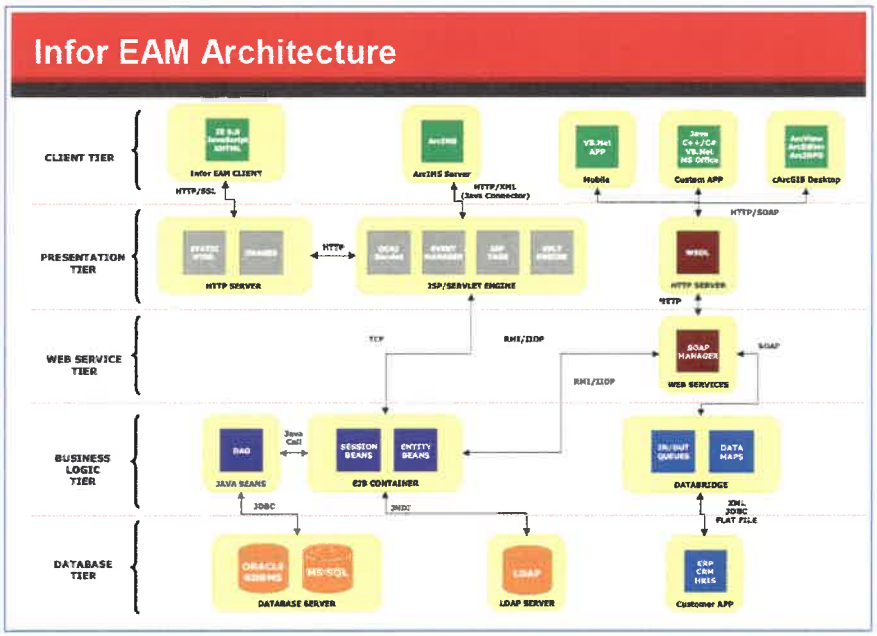


Figure 8.1 - Infor EAM Architecture

System Architecture: Infor's SaaS multi-tenant cloud utilizes AWS private subnets, called Virtual Private Clouds (VPC) where VPCs are deployed along with shared infrastructure to serve various CloudSuites across Infor clients. Access control lists and an AWS construct called Security Groups are used to control inbound and outbound traffic (by default, no traffic is allowed into or out of the VPC). Only with specific, written approval from a customer's authorized security officer do we allow traffic from any publicly sourced location into the VPC. Databases are logical (virtualized), and each tenant is provisioned with its own database schema within a cluster. Tenants are provisioned with a unique and logical database which is established with their unique TenantID.

Significant Architectural Aspect: The Infor Cloud built on Amazon Web Services (AWS) offers you the best available cloud infrastructure, network services, and application designs—so you get the reliability, security, and scalability you need to trust your business to cloud-based software. Infor's innovative cloud technologies, built to work hand in hand with the world class capabilities of Amazon Web Services, can give your organization the power and responsiveness you need to stay ahead in a business environment that's more fiercely competitive than ever.

- Rapid scalability—Infor CloudSuite solutions can easily adjust to changes in processing volume as your business demands fluctuate, because of the way Amazon Elastic Load Balancing automatically adjusts to cover shifting capacity requirements. That's especially important in businesses that need to respond to highly variable levels of demand, such as seasonal sales or annual events.
- High availability—All the Infor products can be spread across multiple AWS Availability Zones (AZs) to optimize fault tolerance and reduce any risk of downtime. We've built everything to minimize single points of failure, so whether you're a global manufacturer that runs 24X7, or a hospital provider, you won't have to worry about downtime.
- Great elasticity—Infor can now deploy mission-critical enterprise applications with a wide variety of server configurations and varying utilization, thanks to the exceptional flexibility of the Amazon Elastic Compute Cloud (Amazon EC2). Because Amazon EC2 readily replaces vast amounts of physical server hardware that you would otherwise have to purchase and deploy, you gain unmatched reliability and availability at no additional cost.

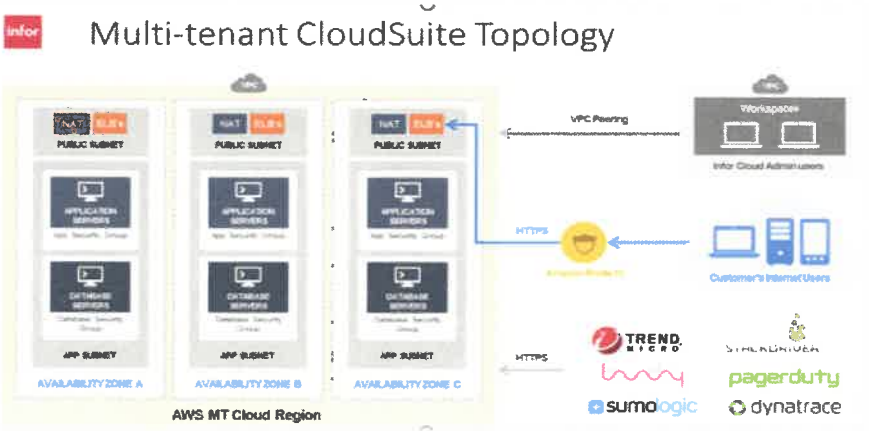


Figure 8.2 – Multi-tenant Topology

- Quick disaster recovery—Infor CloudSuite solutions help ensure business continuity in the face of the most challenging disaster recovery scenarios. Our solutions can be distributed globally across AWS data centers, plus, AWS offers sophisticated global failover capabilities. Combine the two, and you get rapid redeployment of both applications and data in response to nearly any imaginable service disruption around the globe.

AWS maintains data centers in geographically disperse data centers for redundancy. Infor will work with the customer to select AWS data centers that best fits their needs.

4.2.1.2 Vendor's proposal should outline all software and hardware components required to meet the mandatory requirements. The proposal should identify any features/functionality that exceed the mandatory requirements. The proposal must contain technical documentation on each componentin the proposed solution. This documentation will allow for a comprehensive evaluation.

Infor Response:

The Infor solution is a complete SaaS solution. No onsite installation besides a recent supported browser is required. All access to Infor's Cloud applications is over the public Internet, leveraging encrypted connections (HTTPS over TLS) via a compatible web browser. No unencrypted communication is ever allowed into or out of the Infor Cloud.

Product	Modules
Infor EAM Enterprise (base)	Work Management, Asset Management
Infor OS Essentials	ION, Ming.le, DataLake, IDM, Single Sign-On
Web Services Toolkit/Connector	Integrations
Infor EAM Advanced Modules	**Requirement Need / Comments**
Advanced Reporting	Standard Reports and Ad-hoc reports
Alert Management	Alerts, Notifications
Electronic Signatures	Electronic Signatures
Fleet Management	VMRS Codes, Fuel Management
GIS	ESRI GIS
Mobile	Work Orders
Optimized Scheduler	Scheduling Optimization
Reliability Planning & Analysis	Reliability, Risk, Analysis
Service Request	Service Requests
Additional Infor Solutions	**Requirement Need / Comments**
Infor Birst	Reports, Analysis
Infor UAP	Client Training Guides, Videos

4.2.1.3 Vendor should describe the process for deploying the components outlined in the proposal andshould address a recommended approach for the migration of existing data and services.

Infor Response:

Infor recommends only converting the data that is required to Go-Live (recommendations below) and retain the legacy history in some type of archival location. This enables the project team to focus on the creation of the system of the future without spending exhaustive time during the project on recreating transactions of the past.

Historical data can be converted post Go-Live using the same processes created for the upload of current balances defined in the table below. The challenge becomes the amount of effort required from WVDOT resources in this effort. Only WVDOT knows its data. The cleanliness and completeness of data both can create a significant demand on WVDOT resources.

If it is absolutely necessary to convert historical data and WVDOT resources are constrained, we recommend utilizing the Infor Data Lake.

Infor's perspective on data conversion is grounded in lessons learned on numerous government A data lake is a central repository for all data types and formats, structured, semi-structured, or unstructured. Data is stored as-is, without any transformation. Since data is stored raw, there is no need for it to conform to pre-defined schema. This also means data lake storage is low-cost and highly scalable. If this Is of Interest, Infor can discuss further during the demonstration round. When contacting Infor references, please inquire about their respective data conversion experiences.

The Infor Pre-Built Interface Conversion Programs

Infor provides standard flat-file import batch programs for common larger volume interfaces. We also provide conversion workbooks and documentation of the conversion file layouts expected by the import routines. These batch programs exist for most major transactions and master files.

We would utilize this method for the required conversions from your legacy system to Infor's solutions.

The following flow-chart offers an overview of the data conversion process.

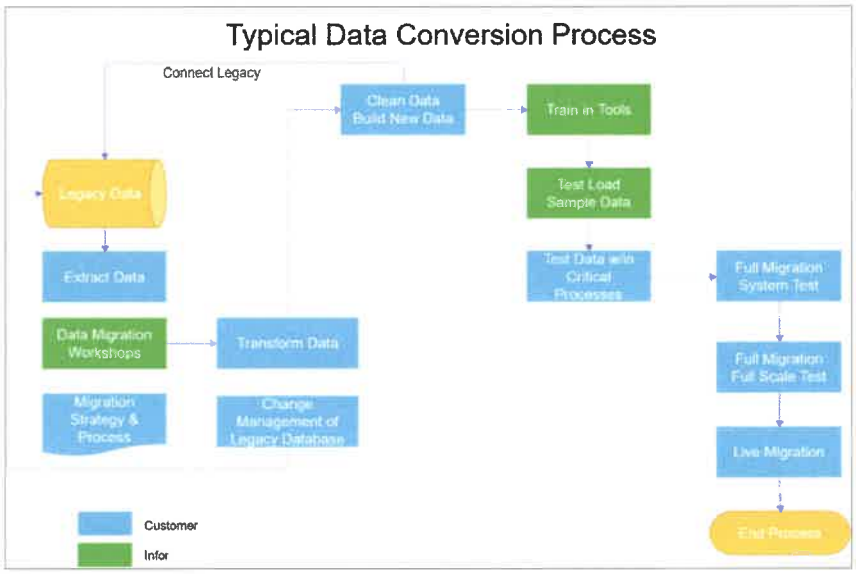


Figure 8.3 - Conversion Process

Infor Sample Conversion Process and Scope

"Data Migration and Conversion" means the efforts associated with the analysis, cleansing, transformation/mapping, loading, and reconciling of current or historical data from other systems into Infor systems (or prior Infor systems into current Infor systems), whether by manual or programmatic methods.

Infor will provide the Infor migration/conversion manuals and file layouts and data migration/conversion work sessions will be conducted to review the Infor standard migration/conversion programs and migration/conversion process. The Infor functional consultants will provide data mapping support. The data to be converted will be mutually identified during the Elaboration stage of the implementation.

Within the table defined below, the column "Responsible" represents the key or primary owner of the specific activity listed. The column of "Assist" represents the responsibility of the WVDOT or Infor for the efforts of assisting in the specific activity defined listed.

Activity	Responsible	Assist	Key Assumptions	Description
Train WVDOT in data migration tools	Infor	WVDOT attends training	WVDOT has suitably qualified personnel that have experience and knowledge of existing legacy systems that attend the training.	Infor will train WVDOT IT staff on the use of the Infor data migration tools.
Extract data from legacy applications	WVDOT	Infor provides advice and guidance	WVDOT has tools and the competency to execute this data responsibility.	All activities involved in getting data from existing systems into the appropriate cleansing tools.
Conduct Data Migration Workshops	Infor	WVDOT IT and Functional Staff	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems.	Cross functional workshops to define the data migration process and mapping required.
Develop Migration Strategy and process description	WVDOT	Infor	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems.	Defines how the process is going to be managed and routines used.
Develop data migration / conversion plan	WVDOT	Infor provides advice and guidance	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems. the WVDOT PM will lead and manage this work with Infor's assistance.	Data conversion Project plan containing tasks, duration, resources, and schedule. Infor will validate the data conversion plan.
Document data mapping requirements	WVDOT	Infor provides advice and guidance	WVDOT provides staff for documentation.	Data mapping documents are developed to provide specifications for field mapping and translation from the legacy system (or staging) tables to the Infor tables. Infor will provide a template.
Design migration / conversion routines	WVDOT	Infor provides advice and guidance	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems.	Technical design documents for the conversion routines are created based on the data mapping requirements and migration strategy.

Activity	Responsible	Assist	Key Assumptions	Description
Develop data migration / conversion routines	WVDOT	Infor provides advice and guidance	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems.	Programming and unit testing of the migration / conversion routines.
Determine data that will need to be manually loaded.	WVDOT	Infor provides advice and guidance	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems.	Where the conversion method is manual, WVDOT is responsible for performing the data preparation and data entry. Infor will provide templates and guidance.
Transform Data	WVDOT	Infor provides advice and guidance	WVDOT has suitably qualified personnel that have experience and knowledge of existing legacy systems.	The legacy data is transformed into the new data base structure. New fields are created and populated.
Test load sample data	Infor	WVDOT	Infor will lead the first sample test loads along with WVDOT IT staff.	Sample tests will be done as early as possible to help ensure the end-to-end process is working.
Test data within critical business processes	WVDOT	Infor provides advice and guidance	WVDOT has suitably qualified functional and technical staff with experience and knowledge of existing legacy systems.	Process Owners will test the critical business processes using sample data during the Acceptance test. Infor will provide sample test scenarios and test scripts that will be tailored by WVDOT and used for all testing
Data cleansing and rationalization	WVDOT	Infor provides advice and guidance	Data fields will be reviewed by the appropriate WVDOT business owner to ensure that the data is accurate and meets the business requirements.	All data fields will be reviewed by the appropriate qualified business owner to ensure that data is accurate and meets the business requirements.
Test load sample data	WVDOT	Infor	There is a new environment for data migration with master configuration tables.	Sample tests will be done as early as possible to help ensure the end-to-end process is working.

Activity	Responsible	Assist	Key Assumptions	Description
Test data within critical business processes	WVDOT	Infor provides advice and guidance	The Process Owners have been trained in the Infor application.	Process owners will test the critical business processes using sample data during the user acceptance test.
Full Migration – Non-live Parallel Test	WVDOT	Infor provides advice and guidance	The testing requirements and process will be determined by the Test Plans.	All data will be migrated to ensure performance is measured. Final test of all the data conversion.
Perform live migration	WVDOT	Infor provides advice and guidance	Conversion testing completed	Live data migration.

4.2.1.4 Vendor should describe the VPS technical support and maintenance needs along with their staffcapability to support them and include a detailed plan for hardware/software support and knowledge transfer, installation, ongoing support, and training.

Infor Response:

Knowledge Transfer

The Infor Education strategy for project (core) team members starts knowledge transfer at the earliest stages of the project. A well-trained project team makes better implementation decisions and reduces the number of customizations. We begin with fundamentals before progressing into application and technical training where training is focused on preparing your functional and technical teams for the decisions they will face in data mapping workshops and conference room pilots (CRPs). Throughout the implementation, there is a gradual transfer of knowledge from Infor consultants to your project team until the members of the project team become the drivers and champions of the new system and business processes.

Your Project Team program may consist of a combination of public, private, formal, informal, in-person, virtual, and online training. Formal training, or Education Events, (available in public and private engagements) are designed to provide detailed information on the technology platforms and functional application features and functions in your Infor Solution. The courses include hands-on labs, in-class exercises, and real-world examples to increase the effectiveness and relevance of the instruction. Cost includes instructor fees, training materials, and access to a training environment. When applicable, Infor defines and schedules Informal training, or Private Training Workshops. These workshops are delivered by Infor Consultants in a consultative manner and use less formal materials and often use the Licensee's training environment and data.

Training

The following information addresses Item 4.2.1.4 for training of WVDOT project team members and support staff.

Project Team Readiness

Infor Education is staffed by professional instructional designers who work with our certified instructors and Infor product and implementation experts to create our content as well as innovative and flexible

delivery options. Infor offers these convenient and cost-effective learning options to allow you to select the blend that works best for you and your employees.

The Infor Education strategy for project team members starts knowledge transfer at the earliest stages of the project. A well-trained project team makes better implementation decisions and reduces the number of customizations. We begin with fundamentals before progressing into application and technical training where training is focused on preparing your functional and technical teams for decisions that they will face in data mapping workshops and conference room pilots (CRPs). Throughout the implementation there is a gradual transfer of knowledge from Infor consultants to your project team until the members of the project team become the drivers and champions of the new system and business processes.

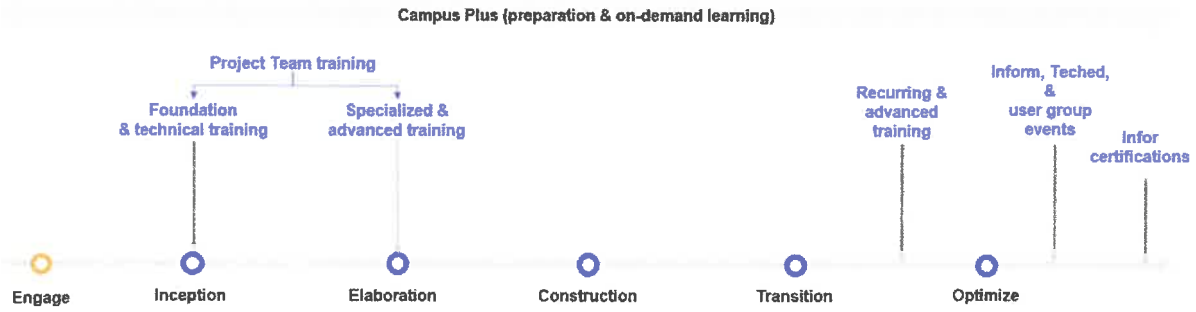


Figure 8.4– Campus Plus

Your Project Team program might consist of a combination of public, private, formal, informal, in-person, virtual, and online training. Formal training, or Education Events, (available in public and private engagements) are designed to provide detailed information on the technology platforms and functional application features and functions in your Infor Solution. The courses include hands-on labs, in-class exercises, and real-world examples to increase the effectiveness and relevance of the instruction. Cost includes instructor fees, training materials, and access to a training environment. When applicable, Infor defines and schedules Informal training, or Private Training Workshops. These workshops are delivered by Infor Consultants in a consultative manner and use less-formal materials and often use a Customer's training environment and data.

Infor Campus Plus Membership

The Infor Campus Plus Membership includes eLearning content, both demonstrations and recorded presentations by our experts; Course Workbooks; and Instructor office hours. The Campus Plus Membership is a SaaS fee based on your Infor Solution. It provides Enterprise-wide, unlimited access to content for that solution. Infor Education encourages Project Team Members to take advantage of self-study options as preparation for knowledge transfer (both formal and informal), for review throughout the project, and for Release Training for ongoing training. Infor also encourages organizations to leverage this content for post-implementation employee turnover. As new content becomes available, it is added to, and available, at no additional cost.

Project Team Training Scope

The following table lists the courses applicable to your Infor Solution and the delivery mode recommended for your project.

Course Title	Course Duration (Days)	Sessions	Delivery Method	Number of Attendees
CloudSuite EAM: Foundation	5	1	Private Education Event	Up to 14
Infor OS: Using Infor OS Features with CloudSuite EAM	1	1	Public Education Event	2
Birst: Foundations for Analysts	2	1	Public Education Event	2
EAM: Configuration and System Planning	5	1	Public Education Event	2
EAM: Configuring KPIs, Inbox, and Grid Designer	3	1	Public Education Event	2
EAM: Designing Reports with the Advanced Reporting Tool	4	1	Public Education Event	2
EAM: Using the Upload and Import Utilities	2	1	Public Education Event	2

Ongoing training for WVDOT Support staff is supported by Infor Campus Plus. The Infor Campus Plus Membership includes eLearning content, both demonstrations and recorded presentations by our experts; Course Workbooks; and Instructor office hours. The Campus Plus Membership is a SaaS fee based on your Infor Solution. It provides Enterprise-wide, unlimited access to content for that solution. Infor Education encourages Project Team Members to take advantage of self-study options as preparation for knowledge transfer (both formal and informal), for review throughout the project, and for Release Training for ongoing training. Infor also encourages organizations to leverage this content for post-implementation employee turnover. As new content becomes available, it is added to, and available, at no additional cost.

Training Documentation

Infor Training Documentation for its Education offerings is dependent on delivery type. Delivery types include: Public Delivery, Private Delivery and Self-directed Learning. Details for each method is shown here:

Figure 8.5 – Training Delivery Types

The majority of Infor's Educational Courseware includes the following supporting materials: Course workbooks, Product Simulations, eLearning Courses, Recorded Webinars, and Information Sessions. Access to these materials is provided through Infor Campus Plus. When taking specific courses, course materials including course workbooks, exercise guides and specific course instructions are provided at time of delivery. Samples of course workbooks can be provided at WVDOT's request.

For End User Training, content is developed as defined by the project's scope and supporting modality. The following describes Infor's approach to End User Training and detailed descriptions of multi-modal learning programs that can support WVDOT End Users.

Infor's Approach to End-user Training

One of the most critical success factors in realizing the benefits of any new and integrated Enterprise solution is training. Our mission is to enable our customers to lower their total cost of ownership and realize the benefits of the Infor solution as soon as possible, and we do this by providing a comprehensive training and on-going learning and performance support solution for end users. Infor believes that the following criteria are essential for the success of any end user training solution:

- *Performance and outcome-based focus* – an end user training solution must focus on the business tasks the employees perform, not system functionality. The overall goal of the solution should be to prepare individuals to do their jobs, or run their organizations, leveraging the new processes and tools, not focus on how the system works.
- *Blended approach* – today's learners expect to be able to access their learning when they want it, how they want it, and when they need it, in easily digestible chunks. Our experience has shown that there are significant benefits to a learning solution that offers a blend of traditional instructor-led training augmented by online learning (eLearning) and micro-learning elements (YouTube-like videos). Training can be deployed in multiple modalities to meet the diverse learning needs of our customers' employees.
- *Instructional effectiveness* – focusing on performance goals, the training content and activities should be tailored to the achievement of those goals, to enhance the instructional effectiveness of the materials for each user audience.
- *Sustainable solution* – the needs for end user training won't go away after Go-Live. There will be an ongoing need to train new employees and to cross-train or re-train individuals as they change jobs or their organization goals change.

Well-trained users will drive higher productivity and reduced support costs. With this focus, we help our customers increase return on their business and technology investments by reducing employee time-to-competence and improving overall job performance.

End User Training Design & Development Methodology

To ensure a performance and outcome-based focus for an end user solution, Infor follows a proprietary methodology to objectively assess the learning needs and provide recommended solutions that are targeted on end user performance. We follow a proprietary methodology for the design and development of our customers' training solutions making modifications as needed to align with customer's project requirements and established methodologies.

Essential Elements of a Blended End-user Training Solution

This section provides additional detail on the essential elements of an end-user training solution. To assist with the creation of several of these deliverable types, Infor recommends the use of a training development tool. Infor will determine which tools are available during the training analysis phase to identify options and determine the appropriate tool to use.

eLearning (Self-Paced Web-Based Training). Large populations of users can effectively be trained on business processes and basic system tasks using web-based training (eLearning). This web-based training will be developed using an agreed upon development tool and present concepts related to the business process. The eLearning will include simulations so that users can practice system tasks and will include knowledge checks as well as reference to other support documentation, such as work instructions and FAQs.

Instructor-Led Classroom Training (ILT). For smaller user populations that require in-depth training on use of the system, such as payroll and time administrators, hands-on instructor-led training is most effective. In instructor-led classroom training, instructors will present concepts related to the business processes and system functionality. Referencing step-by-step procedures called work instructions, instructors will conduct demonstrations of key tasks in a live training database. The database will be representative of the production system the participants will see back on the job, including realistic data created in consultation with the customer's project team. Participants then will complete hands-on exercises using the training database. These exercises will provide basic practice as well as require the participant to apply what they have learned to real-life situations. Participants will also learn how to support themselves back on the job using the online help system.

Instructor-Led Virtual Training (VILT). Where classroom training is not appropriate or economical, instructor-led classroom materials can be used for virtual training sessions. As in classroom ILT, instructors will introduce the concepts related to the business processes and system functionality. The instructors also will conduct demonstrations of key tasks using the training database. In virtual ILT, participants will complete hands-on exercises using system simulations (this is done to simplify the logistical requirements of the training, both from a technical perspective and an instructional one). Finally, as in the ILT, the participants will learn how to access performance support materials through the online help system. VILT can also be effective in delivering "webinars" to present business process and system overview information to a large and dispersed audience.

Performance Support. A key element of our solution is the use of a performance support site (or online help system). Infor recommends our customers build an internal performance support website to host the training documentation created during the development phase. Our customers are responsible for providing and maintaining the website or similar SharePoint site. The performance support site also includes conceptual presentations, links to simulations, job aids, FAQs, and other help materials identified by the customer. This approach provides an ongoing support strategy that extends beyond the training event and provides just-in-time information to the end-user's desktop whenever it is needed.

Infor User Adoption Platform. Rather than focusing on a single learning event, Infor User Adoption Platform (Infor UAP) helps your organization get the most out of your technology investment by providing "moments of understanding" throughout the software lifecycle. During the implementation phase, Infor UAP provides powerful content authoring and management functionality that allows authors to create custom learning content that directly reflects your new technology. When the

software goes live, this content is delivered to users, right within the application, so they can access help at their time of need, on the device of their choice, in a form that's relevant to the employee's role and language. With Infor UAP, authors, subject matter experts, and business stakeholders can rapidly create and edit everything from procedural documents to simulations and eLearning courses. Content is published to a performance support website where end users access all their content and receive personalized notifications relevant to their learning. Infor UAP provides both current and future employees the knowledge and learning they need to master your new applications, ensuring that your organization maximizes ROI on its technology investment.
Train-the-Trainer Approach

Infor typically proposes a Train-the-Trainer approach to prepare customer SMEs/Trainers to deliver the instructor-led and virtual training. Customers benefit by identifying resources who can serve as Trainers. The advantages of using customer resources serving as Trainers are:

- They have credibility with end-users because "they understand our jobs"
- They relate system tasks to real-world events
- They reinforce business processes and changes caused by the implementation

As part of the Train-the-Trainer program, Infor conducts workshops to introduce customer trainers to the blend of training components, classroom materials, instructional activities, and online resources that have been developed so the trainers become familiar with the structure of the courses and how each course element is used during the training event. Trainers also can "teach back" key sections of the training and receive feedback on their performance, both to reinforce their understanding of the system and to practice their teaching skills in a safe setting.

End-user Training Delivery

The Training Delivery Plan, which is developed with the customer during the Construction phase provides the details regarding the approach and resources required for end-user training delivery. While a significant amount of the training can be deployed as self-paced learning, the delivery plan will address other ways to train and support customer employees through VILT "webinars" and coaching. Infor will develop Instructor guidelines and checklists for delivering the Instructor-Led Training, which customer trainers can then use to train their managers who in turn can train and support their employees as needed using the same materials.

End User Training Scope

Infor proposes an End User Training Blueprint, Learning Factory (development support), and a Train-the-Trainer program. Infor will staff these services with an EUT Principal Consultant, Senior Consultant, and offshore development resources. The EUT Services includes a Training Needs Analysis, development of training materials, and delivery support. The results of the Training Needs Analysis will define best approach for training the end users and update estimates for the content design, development, and delivery.

Examples of the types of training materials to be developed include the following:

End User Topic / Delivery Mode	Web-based Training	Micro Learning	Instructor-Led Training	User Procedures & Simulations
Overview & Navigation	✓	✓		✓
Enterprise Asset Management	✓	✓	✓	✓
Reporting	✓	✓	✓	✓
Totals	1 hours	3	3 hours	120

Infor also proposes the Infor User Adoption Platform (UAP) Jumpstart. This Jumpstart teaches your learning department to use UAP and establish templates and standards for the end user training program associated with this Infor Implementation. The UAP Jumpstart is staffed by an EUT Principal Consultant. The expected level of effort for the EUT Principal Consultant is 80 hours starting in the Elaboration Phase of the project or as scheduled per the approved schedule.

Below is a summary description of the key activities and deliverables in the UAP Jumpstart:

Week 1: Requirements, Planning & Training	Week 2: Training & Support
• Requirements Gathering and Design Sessions • UAP Approach for Training Development, Delivery and End User Support • Define Document Standards and Development Process • Create client specific UAP templates identified in requirements gathering phase • Deliver UAP Admin and Training Manager Training (2 days)	• Deliver UAP Developer Training (3 days) • Coaching and Support • System / Template Refinement

The End User Training program and UAP Jumpstart will enable WVDOT content developers to garner the necessary skills to effectively support and continue development of materials for ongoing training needs within the organization.

Communications and Change Management

Infor's Approach to Organizational Change Management (OCM)

The Infor Organizational Change Management (OCM) model uses a set of tools and organizational interventions to link the business with the new system and increase the likelihood of a successful transition. This model helps our customers proactively manage the new business processes and organizational structures that impact employees due to changes brought on by the Infor implementation and Customer can expect significant reduction in the depth and duration of productivity loss that occurs with major changes. With an Infor change management program, Customer leadership will gain the clear vision needed to achieve a major business directional shift.

Building the foundation and capability to perform within the new processes and technical environment requires active leadership, engagement of a key group of stakeholders, communications planning, alignment of roles and tasks, education, and skill development for those who will use the system, and high performing project teams. The following activities we propose for Customer will define their approach to accelerate understanding, acceptance, and user adoption of a new business system:

- Communicating with and aligning business leaders on the vision, value, benefits, goals, metrics, and accountability of the project
- Assisting business process managers to take accountability for the success of the implementation and to drive the realization of benefits and value
- Preparing, training, and supporting the end users who will be regularly using the system

These activities are integrated into the Infor Deployment Methodology and encompass the entire Infor project lifecycle. Activities begin as early as possible to ensure executive alignment which ensures critical alignment with business leaders, project sponsors and ultimately, the end user community.

Infor's Deployment Methodology is how the Infor change management and training consultants align with the Infor application and technical consultants and project leadership. Through this methodology all consultants, leadership, and client team members are aware of project goals, objectives, schedule, and status.

Figure 8.6 - OCM and Training – Alignment with IDM

Organizational Change Management Scope

Infor proposes the Organization Change Management Blueprint staffed by an OCM Principal Consultant. The OCM Blueprint includes interviews and workshops to provide a clear vision and roadmap for the project, identify key organizational risks and challenges, and integrates the findings into an overall change management strategy and approach. The expected level of effort for the OCM Consultant is 320 hours starting in the Inception Phase of the project.

This effort will establish a foundation for success for Customer change initiative by defining key organizational risks, challenges, and cultural barriers to integrate into an OCM Strategy, Approach, Key Messaging Framework and Case for Change.

Customer will provide a Change Management Lead to work in partnership with Infor's OCM Lead for the duration of the OCM activities. If requested by Customer, Infor will provide additional change management consulting support services to assist with the overall execution of the deliverables as needed.

This effort includes the following activities and work products:

- Stakeholder Analysis
- Organizational Change Readiness & Risk Assessment
- Change Management Strategy & Approach
- High-level Communication Plan
- Change Management Level of Effort Estimate

Ongoing Implementation Specific Support and Managed Services

Infor organized its proposal to align directly with WVDOT responsibilities after transitioning to the cloud. After going live on an Infor SaaS solution, there are still recurring application management responsibilities that customers need to consider. While an Infor CloudSuite EAM deployment provides many efficiencies, it does not eliminate all IT management and maintenance responsibilities.

Within the Infor SaaS delivery guide, Infor outlines what is included as part of their ongoing Infor application support. Still, it also provides the scope of the customer's responsibilities beyond what is covered by Infor cloud support. Generally, Infor's support of the SaaS application covers the availability and performance of the standard application. Supporting specific configuration,

customization, and meeting new business requirements are the customer's responsibility. The table below outlines the tasks, roles, and responsibilities with an Infor cloud solution.

Services	SaaS services	Infor managed services
Application availability & performance	●	
Application updates	●	
Standard application support	●	
Monitoring services	◖	◗
Super user 'how to' support		●
Configuration and technical 'why' support		●
System management and administration		●
Monthly CU impact assessment and remediation		●
Regression testing of changes		●
Support and update of extensions		●
Creation of solution enhancements		◗

Infor cloud managed services complement SaaS support to enhance the as-a-service customer experience

All services utilize the same Infor support portal, enabling integrated and optimized support coverage

Figure 8.7 -Tasks, Roles, and Responsibilities for an Infor Cloud Solution

Customers leveraging a cloud deployment must decide how these responsibilities are resourced and managed. Staffing and retaining a team with all the needed skills and global coverage to support its use of enterprise applications can be costly and time-consuming for many customers.

Infor Managed Services is uniquely positioned to help Infor customers get the most out of their Infor CloudSuite EAM application investments.

Infor organized its IMS cloud offering into four service pillars directly aligned to address the specific, critical customer responsibilities after post-go live. The IMS service pillars will address each of WVDOT's desired outcomes and value-based requirements. As part of our IMS proposal, Infor has included three of the following pillars, with Release Impact Management being an optional fourth.

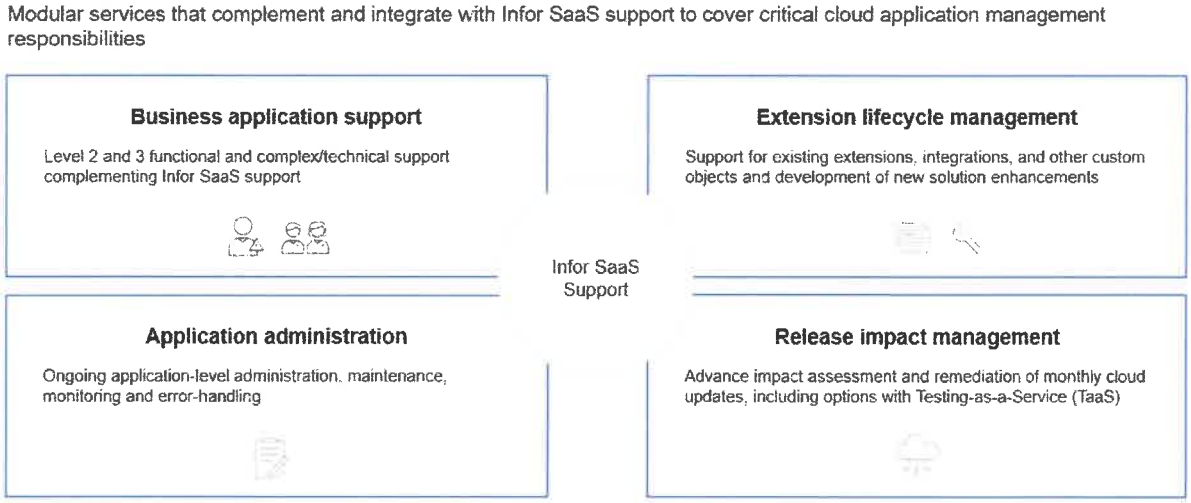


Figure 8.8 - IMS Service Pillars

The IMS service pillars are aligned to drive the following outcomes for customers:

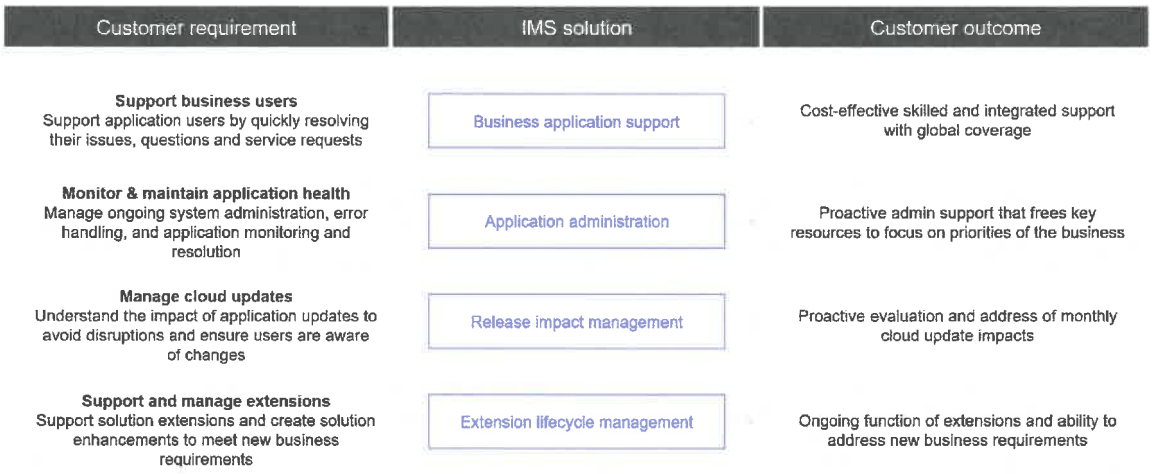


Figure 8.9- IMS Pillars Outcomes

Infor organized its IMS cloud offering into four service pillars directly aligned to address the specific, critical customer responsibilities after post-go live. As part of our IMS proposal, Infor has included each of the following pillars. Infor provides descriptions for each services pillar as follows:

IMS in scope Applications	Pillar 1 Business Application Support	Pillar 2 Application Administration	Pillar 3 Extension Lifecycle Management	Pillar 4 Release Impact Management
Infor CloudSuite EAM	In scope	In Scope	In Scope	In Scope

Pillar 1: Business Application Support

Business Application Support (BAS) delivers functional and complex issue support to complement and supplement Infor product-level support. Customers can then spend less time troubleshooting their unique issues and wondering how to do something and get to resolution faster, resulting in increased results and productivity for their users.

Infor customers traditionally keep Level 1 end-user support, but we do provide it to some customers who require it. Infor Managed Services support typically starts where your key users' expertise stops.

The process flow goes through concierge and triage with Infor support first, so the customer gets an integrated service experience, and issues best addressed by Infor support are handled there. Tickets outside of the scope of Infor support are then forwarded to and addressed by IMS.

Infor established its IMS mode with two key goals in mind:

1) BAS serves as the 'service desk' for IMS. All questions and issues that come to IMS start here for resolution with standard application and configuration approaches and answers.

2) IMS validates that whatever the question or issue is, it ends up with the right resources identified and assigned – wherever they may be in Infor.

Infor will provide Technical and Functional support and assistance for the in-scope Infor applications outlined in this response as follows:

- Identify support customer users of the services as 'Key Users' in the IMS Customer Profile Document

- Enable identified customer Key Users to submit support requests in the Infor Support Portal
- Troubleshoot and diagnose reported Service Incidents and Service Requests
- Provide recommended actions for knowledge gaps, user errors, or data correction
- Answer questions from Key Users about standard in-scope application configuration, features, functionality, and extensibility tools
- If Customer issues or requests are beyond the scope of the IMS agreement, escalate

Pillar 2: Application Administration

Application Administration provides "out-tasking" of standard, repeatable administrative responsibilities like managing logs and queues or monitoring critical jobs, flows and interfaces. The IMS Application Administration services frees the customer from staffing essential resources to basic system admin tasks while also improving service by leveraging the after-hours coverage of the IMS global team.

For application-level monitoring, IMS works with the customer to define the right approach to failures based on the process. Whether it's a restart, a troubleshoot, or notify the customer of the need for action.

Beyond monitoring, this includes setting and managing an ongoing schedule for maintenance tasks such as those related to cloud updates, purging queue history and logs, and addressing performance issues if you experience processing time issues.

Application Administration includes:

- Monitoring and response for a to be determined set of standard application jobs, processes, and interfaces
- Maintain application logs
- Perform pre-and post-release administrative tasks for monthly cloud application updates
- Perform pre-and post- administrative tasks for data copies and refreshes from the Production environment once per calendar quarter
- Perform pre-and post-release administrative tasks for Analytics Prebuilt content updates

Pillar 3: Extension Lifecycle Management

Extension lifecycle management provides customers access to the configuration and development skills needed to support and update their extensions/customizations when needed and to develop new ones when new business requirements call for them. This way, the customer always has the agility and skills necessary to meet new needs without hiring, developing, and retaining the resources themselves.

Extension Lifecycle Management has the following two service components.

1. Support for existing extensions, including the customer's unique configurations, workflows, reports, interfaces, and other non-standard application objects that have been created using Infor extensibility tools. The service includes troubleshooting and resolving reported issues, including remediating customizations as needed in response to impacts of Infor cloud updates. Extension Lifecycle Management support provides:
    - Support and troubleshoot issues that are diagnosed and confirmed to be caused by Extensions
    - Retrofit Extensions to resolve reported issues
    - Retrofit Extensions as needed in response to contents of monthly cloud application updates
    - Revert to standard features when custom code becomes obsolete with the delivery of an application update
2. Solution Enhancements support the customer's changing business requirements and need for assistance with planning and enablement for changes that enable you to optimize business

application and process reporting. Infor trains the IMS team to align with Infor Product and Development teams on new Infor CloudSuite features and functions to leverage the new capabilities to align with customer reporting needs. Customers and other third-party partners do not have the integration and knowledge share that IMS has with the Infor CloudSuite development teams.

Pillar 4: Release Impact Management

Release Impact Management provides an ongoing service that is a cornerstone for collaboration between the customer and IMS. Through this process, IMS provides our customers with an understanding of cloud update content and understanding of what it means to the customer and then collaboratively works to align on any recommended or required actions taken by IMS and/or the customer.

Release impact management enables a proactive approach to cloud application updates that includes release review, impact analysis, and change planning. This way, the customer's team spends less time worrying about or reacting to the impact of monthly cloud updates and more on planning for how the updates can help their business users.

The Release Impact Management service includes:

- Review of the planned contents of the cloud application update and developing a customer specific list of expected impacts
- For any customizations identified and included in the scope of Extension Lifecycle Management services, recommend changes and review with the customer to confirm and prioritize
- Jointly establish a plan with the customer for prioritized actions to be taken

Collaboration – Service Model

Infor assigns two roles to guide the overall execution of the Services for customers. The Service Delivery Manager (SDM) and Services Operations Manager (SOM) support governance and process management activities and collaborate with customers to help drive their desired results and business outcomes.

- Service Delivery Manager (SDM)
  - Provides service delivery oversight of the Services and serves as an escalation point for the customer
  - Provides monthly service reporting and leads customer discussion of IMS KPI performance.
  - Serves as customer contact for any non-standard requests.
- Service Operations Manager (SOM)
  - Manages the day-to-day operational progress and priority of incidents and requests from the customer from submission through resolution.
  - Coordinates the actions of the IMS delivery team in line with customer issue severities.
  - Manages the availability of Infor resources necessary to deliver the Services.
  - Ensures that IMS communicates the status with customers as defined and agreed in the Customer Profile Document.

IMS has robust processes for engaging with customers. The following provides a high-level approach to service request and incident management tools and processes that are in scope for Business Application Support and Application Administration Services

Service Management Overview

- Customer will log issues and requests as service incidents within the Infor Support Portal
- Infor Support determines the incident falls within the scope set forth above; they will notify and forward the incident to the IMS Customer Service Desk, at which point the IMS Service Operations Manager (SOM) will engage
- The Service Operations Manager (SOM) will identify and assign the service incident to an IMS resource based on the description and severity of the incident.

- The assigned IMS resource(s) will review the requirement and, if needed, collaborate with the customer to understand the issue
- If the request requires efforts outside the scope of the Services, IMS and the customer will mutually agree on an approach to addressing the request, including developing a Change Request to add the additional related scope and associated fees.
- Once the IMS team completes a service request or issue resolution, IMS will notify the customer, and the customer will provide for user testing and confirmation of resolution.

Service Model in Production

The IMS support model leverages the Infor Concierge ticketing system and experience and leverages triage from Infor Global Support to determine which issues are outside of their scope and should be routed to IMS to address.

The integrated approach drives a better customer experience, with a single partner responsible for providing support throughout the application and lifecycle. This eliminates transferring of tickets between separate companies, people, and systems. The inefficiencies caused by disparate systems, tools, processes, and people can contribute to a lack of accountability, challenges in knowledge transfer, and communication that can impact the overall effectiveness of the application software.

Figure 8.10: - Integrated Approach

Key elements in the IMS approach to post go-live support for in-scope services:

- **Service Desk:** Integrated ticket handling via the Infor Support Portal.
- **Service Delivery:** Service Delivery Leads assigned as primary offshore delivery resources and knowledge repository owners.
- **Service Management:** Service Operations Manager assigned for operational level delivery process management.
- **Service Delivery Manager** assigned for service-level monitoring and management, governance, reporting, contract management, and customer escalation contact.
- **Service Level Management Reporting:** Standard monthly reporting of service activity and performance. Monthly management meeting to discuss results, trends, issues, and opportunities, and plans.

IMS Summary

As the application developer, IMS has unmatched breadth and depth of skills across the landscape of Infor applications. Helping customers get the most from their Infor software investment is a key objective of IMS, and collaboration with customers is key to meeting this objective.

4.2.1.5 The proposed solution should be compatible with the State of West Virginia software standardsand security policies. The solution should be compatible with Google Workspace products (theState is currently transitioning from Microsoft Office to Google Workspace) and the State of West Virginia's acceptable use policy. These policies are located at:

https://technology.wv.gov/security/Pages/policies-issued-by-the-cto.aspx.

Infor Response:

Because Infor products are used by customers around the world in many different regulated industries, we cannot guarantee that we meet all possible state and local regulations. However, Infor has a Compliance and Governance team with extensive experience.

Members of the team hold lead auditor certificates for both ISO 9001 and ISO 27001, and have completed training on risk management, CAPA management, HIPAA, security, and regulatory requirements. This team performs yearly internal audits to ensure that our policies and procedures, as well as our products, meet the needs of our regulated customers. Customers with questions relating to specific regulations can email QualityAndRegulatoryAffairs@infor.com at any time for assistance.

4.2.1.6 Vendor's proposed solution should support WVDOT in achieving operational excellence in termsof the Fleet Equipment Scheduled Maintenance process as follows:

- **Facilitate the configuration of Preventive Maintenance criteria, which will trigger preventive maintenance activities and notify owners about preventive maintenance due activities for equipment and vehicles.**

Infor Response:

Using Infor EAM, WVDOT users can create Preventative Maintenance (PM) tasks based on a fixed date, perform on day, flexible time-period or metered usage. Users may incorporate routes with a PM task to service multiple assets that share similar PM requirements under a single work order. Infor EAM can automatically adjust PM schedules to compensate for early or late PM work accomplishment. Infor EAM also offers PM Revision Control to track modifications and control the authorization of modifications to PM scheduled task, materials, and routes. PM Forecasting provides the ability to visualize and balance the PM workload across a data range based on staffing levels or workday requirements.

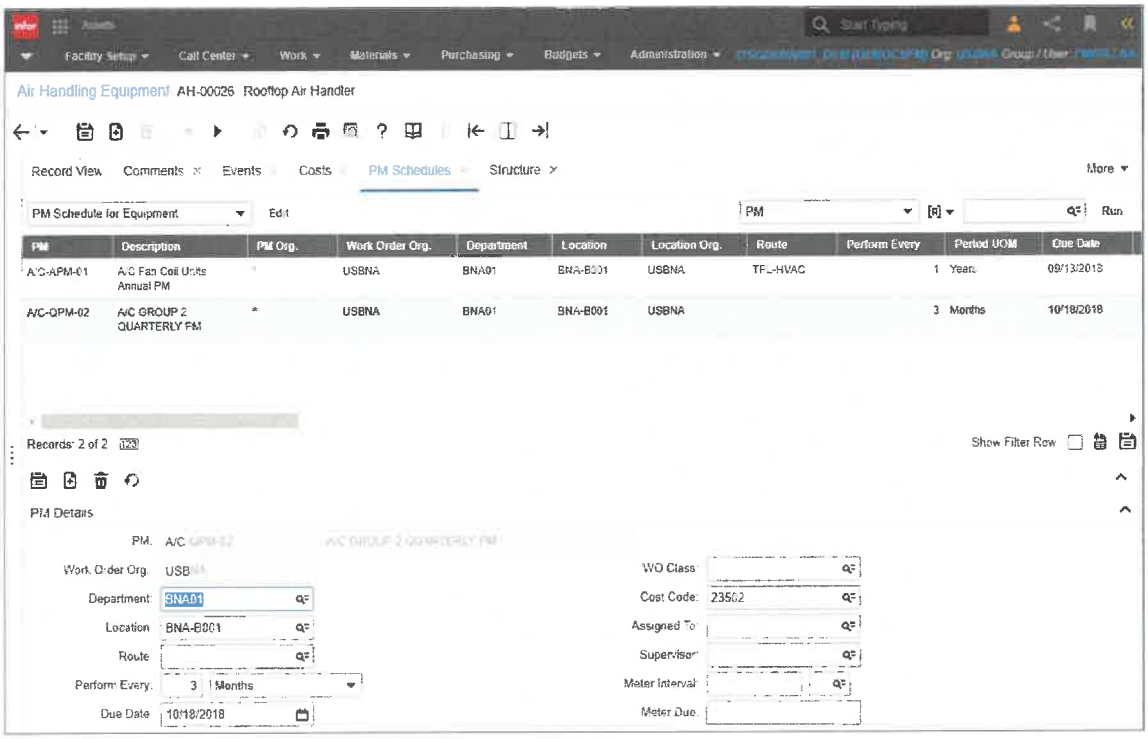


Figure 8.11 - Infor EAM PM Schedules

Maintenance patterns in Infor EAM allow WVDOT to define a schedule of predefined jobs, which have a pre-determined sequence, and are serially generated for a selected list of assets. This pattern identifies when a job should occur, how the system should generate Work Orders for the maintenance pattern and whether the resulting Maintenance Work Order generation is based primarily on a time interval, on a meter interval (i.e.: vehicle miles) or both. Workflows, alerts, notifications, criteria, and other components can be configured by WVDOT to meet business needs.

- **Facilitate in-house repair orders and work reporting in the system.**

Infor Response:

The Infor EAM Work Management module helps WVDOT manage, plan, and monitor work and the resources necessary to complete work. With this module users can define work information such as supervisors, permits, qualifications, trades, employees, shifts, tasks, labor, safety, checklists, tools, material lists, and VMRS codes. Users can create standard work orders, and then apply the information from standard work orders to regular work orders. Users can create regular work orders to repair equipment, modify equipment to meet safety and environmental standards, perform work orders, and record information concerning equipment problems. Users can also add activities to work orders, schedule labor, associate qualifications with work order activities, book labor and vendor hours, associate parts, enter meter readings, create child work orders, add permits, and request tools as necessary. Users can easily view the status of work orders and view work order information such as cost and service request details and close the work order after the work is complete. Work orders can be color coded based on priority, status, and other fields within the Infor EAM solution.

WVDOT can manage its work order schedules with this module by viewing current work order schedules, determining labor and parts availability, and analyzing labor utilization. Users may schedule planned or backlogged work orders or reschedule work orders as necessary. Additionally, users can view work order comments, change work order status, and freeze or unfreeze activity schedules while balancing the workload. The Infor EAM Work Management module interacts

seamlessly with other modules within Infor EAM to facilitate comprehensive work management. A few of the functionalities included with Infor EAM Work Management are summarized below.

Module	Features
Work Order Generation and Scheduling	In the work management module, work requests are manually generated by request or automatically generated by the system (planned work orders). After appropriate screening and authorization, requests become approved work orders and are dispatched for action. A standard work order library simplifies initiation of frequently performed work. With the work management module, users can perform the following tasks: • Schedule non-routine maintenance for asset breakdowns, capital work, and asset relocation. Infor EAM allows users to enter work order detail information even after the work is completed. • Work Order Daily Scheduling • Generate standing work orders for routine or lubrication work including routing for efficient execution • Set up routine, preventive maintenance based on fixed calendar dates, meter readings, fixed or changing frequencies depending on thresholds, and dormant periods • Track claims and warranties at activity and work order level • Easily initiate frequently performed work orders • Quick entry Work Orders • Tool planning
Work Organization	The work management module provides maximum flexibility by allowing WVDOT to plan and organize work orders according to its needs. Users can divide work orders into a series of steps, breakdown complex work orders into child work orders, and design work orders according to specific information. If there are recurring work orders with child work orders, users can create standard work order templates, attach standard work orders as child work orders, and specify the sequence of the child work orders. Any time a work order is generated from the template, Infor EAM generates all associated child work orders. Work orders may include the following attachments: • Resource requirements (labor, materials, tools) • Contractor labor and equipment, such as safety requirements and personal protective equipment • Required permits, Material Safety Data Sheets, and instruction lists • Required technical documents • Drawings, CAD diagrams, P&ID diagrams, etc. • Deferred maintenance
Work Scheduling	Schedule work orders by initiating jobs relating to specific criteria, such as labor requirements and availability, parts requirements and availability, workshop requirements, dormant periods, employee qualifications, and priorities and opportunities.
Work Completion	Enter detailed information after completing a work order. Enter labor hours and costs, material costs, work completed (problem codes), actions taken to complete the work order (action code), free-form comments, and meter readings.
Human Resources Management	Manage human resources by tracking labor resources by trade, accounting for holidays, and analyzing nonproductive hours or downtime.

Module	Features
Purchase Order Tracking	Infor EAM makes it easy for users who create work orders and direct purchase requisitions for job activities to find the status of required purchasing parts. Infor has added a purchase orders tab to the work order (PO) screen. This tab displays the PO and lines for all requisitioned items directly associated with the work order. This feature provides quick access to valuable information that can be used for planning job execution with more accuracy based on pending availability of critical materials.
Preventive Maintenance	With Preventive Maintenance (PM) Work WVDOT can group PM Work Orders of the same Period (frequency) together, so that they can be released together as a set of PM Work Orders under a single parent work order (the Work Package Parent). With PM Plans users can group together and manage PM Schedules that share a common equipment list. Using PM Plans, equipment can be removed/added to many PM Schedules at once. PM Revision Control allows for Management of Change (MOC) of established PM procedures. PM Revision Control Security Setup allows administrators to identify which work order fields can be updated versus protected for PM-based work orders when PM revision control is in use.
Call Center	With the Call Center operators can receive and record calls from customers/employees reporting potential issues with property or assets. A resulting work order can then be created to address the issue, if necessary. If the Work Order would be completed by a third party, a service delivery matrix can be configured to assign the appropriate contractor. A Bulletin Board and a Knowledge Based repository can be configured to provide operators with real-time information of enterprise events that are of interest to callers. The call center is also integrated with our GIS mapping module to allow geospatial tagging of service requests.
Deferred Maintenance	With Deferred Maintenance WVDOT may postpone work on a piece of equipment. Also, activities in a work order may be identified as Deferred. If an activity is deferred the rest of the work order activities are unaffected and will still need to go through the lifecycle and be completed as normal. The deferred activity will remain on the work order and is also placed in the deferred activity queue to be picked later to finish that activity.
Crews	Employees may be added to Crews; thereafter users may Book Labor and Schedule Labor of Crews in a Work Order.
Routes	Routes can be added to sequence the work of multiple work orders and PM work orders.
Multi-Asset Work Order	When performing the same task to multiple assets WVDOT may create a Work Order for all the desired assets. When booking Labor to this Work Order the system can automatically prorate the time and costs between all the assets affected.
Maintenance Patterns	Maintenance Patterns allow WVDOT to define a schedule of predefined jobs, which have a pre-determined sequence, and are serially generated for a selected list of assets. This pattern identifies when a job should occur, how the system should generate Work Orders for the Maintenance Pattern and whether the resulting Maintenance Work Order generation is based primarily on a time interval, on a meter interval (i.e.: vehicle miles) or both.
Maintenance Campaigns	Campaigns tracks the work performed for a specific project. Examples are a project to replace a part that has been recalled or a project to retrofit a train. Campaigns usually have two phases: the first phase is an impact analysis of what assets are affected and the second phase performs the desired activities on those assets.

Module	Features
Reliability	WVDOT can configure Infor EAM to calculate cumulative Weibull and Laplace probability failure distributions. You can graph the shape and scale in a Reliability Chart, a Failure Chart, a Probability Density Chart, or a Hazard Chart
Revision Control	When activated Infor EAM revision control will make sure that changes go through a proper change management process. This includes creating a new revision of the entity which only becomes active, i.e., supersedes the current revision, after it is approved by one or more assigned users. Revision control can be applied to PM Schedules, Routes, Task Plans and Material Lists.

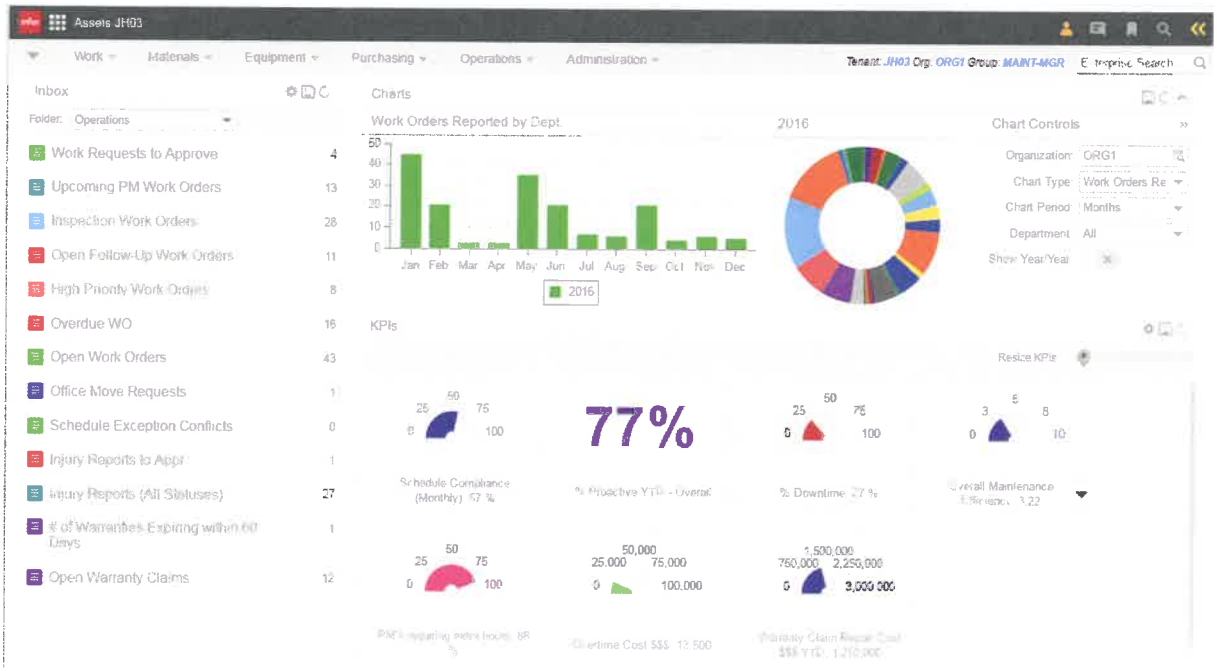


Figure 8.12 - Infor EAM Work Management Dashboard

- **Keep all preventive maintenance repair history updated.**

Infor Response:

History of asset attributes, preventive maintenance, value, location, hierarchy, costs, utilization rates, ownership, phase, status, dates, work orders, events, condition, inspection, level of service, and changes are tracked throughout the asset lifecycle from plan to deposition within Infor EAM. This history follows the asset even as it is transferred between locations, agencies, facilities, and other areas of responsibility.

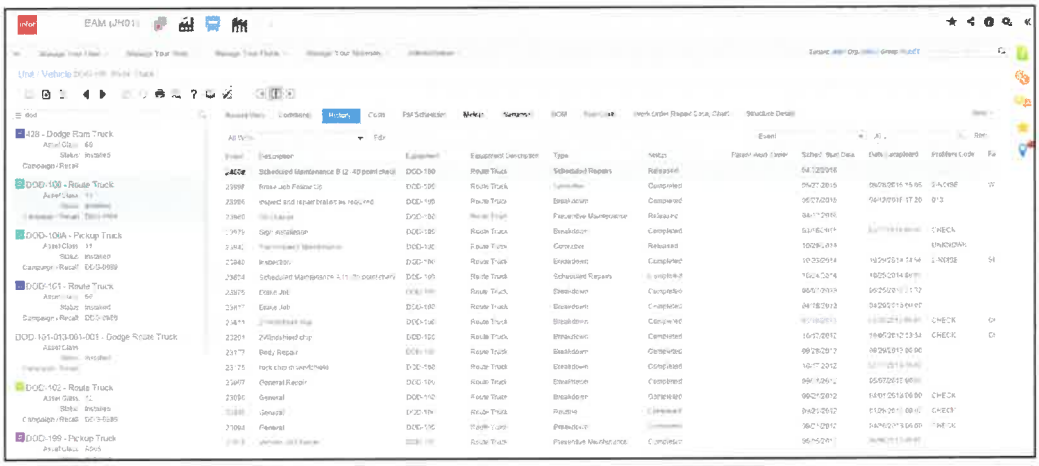


Figure 8.13 - Infor EAM Equipment Work History

- **Record and track commercial preventive maintenance repairs performed by a third party through either entry of the work performed into the system or importing of information provided by the third party who performed the work.**

Infor Response:

Infor EAM allows WVDOT to track all preventive maintenance, repair, and other work order activities against assets within the solution. Work can be performed in-house, contracted, or external services with all costs, labor, materials, activities, and resources easily tracked within Infor EAM. Whether imported using the built-in integration tools or captured via the Infor EAM Mobile apps, WVDOT will be able to capture, track, and report latest information on asset maintenance.

- **Facilitate the management of specific, hierarchal preventive maintenance scheduling.**

Infor Response:

The Infor EAM asset management module gives WVDOT the flexibility to establish physical assets according to its own asset structure. Infor EAM provides the following asset structure options:

- Asset identifiers
- Hierarchical structures of unlimited complexity
- Unlimited number of asset parent/child relationships
- Grouping of assets by system location, such as a process line or electrical circuit
- Choice of functional position (one or more physical assets per position) or tag numbers (one physical asset per functional position)
- Bill of materials, such as a list of parts that may be required for the repair of a physical asset
- Indicators to configure cost roll-up
- Positions, Location and Systems support

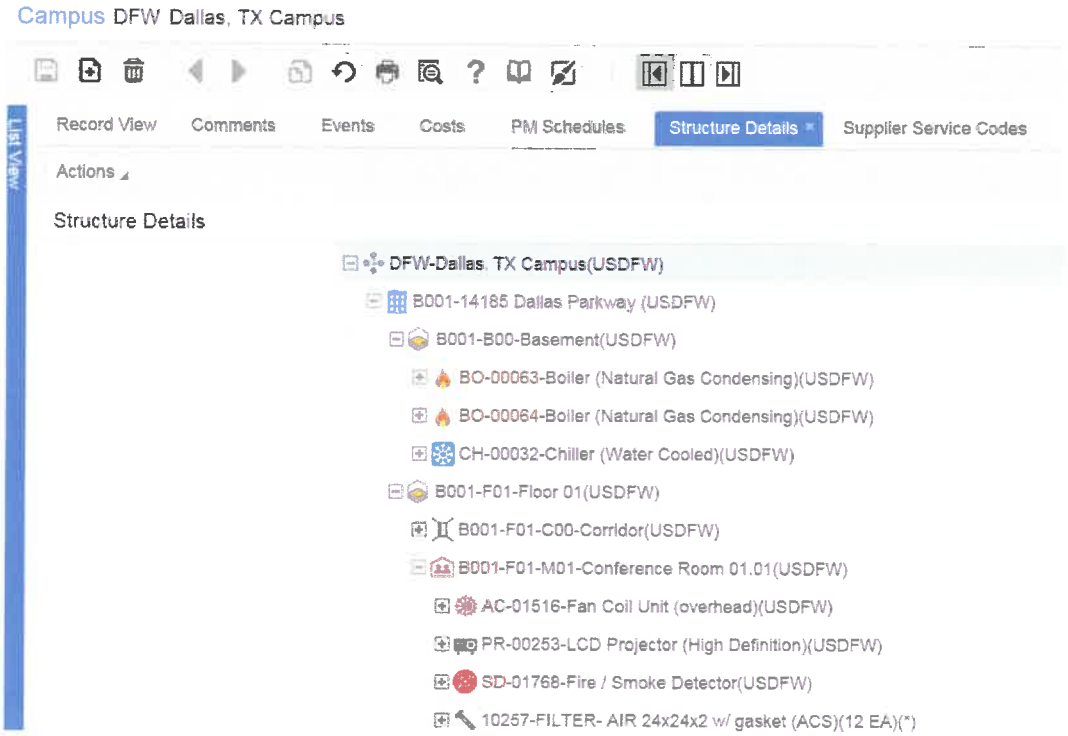


Figure 8.14 - Infor EAM Asset Hierarchy

4.2.1.7 Vendor's proposed solution should support WVDOT in achieving operational excellence in terms of the Equipment Repair business process as follows:

- **Facilitate in-house repair orders and work reporting in the system.**

Infor Response:

As previously responded in 4.2.1.6, the Infor EAM Work Management module helps WVDOT manage, plan, and monitor work and the resources necessary to complete work. With this module users can define work information such as supervisors, permits, qualifications, trades, employees, shifts, tasks, labor, safety, checklists, tools, material lists, and VMRS codes. Users can create standard work orders, and then apply the information from standard work orders to regular work orders. Users can create regular work orders to repair equipment, modify equipment to meet safety and environmental standards, perform work orders, and record information concerning equipment problems. Users can also add activities to work orders, schedule labor, associate qualifications with work order activities, book labor and vendor hours, associate parts, enter meter readings, create child work orders, add permits, and request tools as necessary. Users can easily view the status of work orders and view work order information such as cost and service request details and close the work order after the work is complete.

- **Support importing of commercial repair data for work performed by a third party.**

Infor Response:

Infor EAM has multiple ways that repair data from third party sources can be imported for processing, analysis, and initiating action. Data can be imported through user-initiated processes (e.g., from spreadsheets) using the built-in Infor EAM Import Utility. The Infor EAM Import Utility is a tool that uses Web services to insert or update selected tables in Infor EAM. This facilitates rapid insertion of data into the system without the need for manual data entry. For example, WVDOT users can now load 100,000-part items from a newly acquired warehouse in a matter of seconds. Data can also be automatically imported and exported through APIs and/or Web Services.

- **Keep all repair history up to date.**

Infor Response:

History of asset attributes, preventive maintenance, value, location, hierarchy, costs, utilization rates, ownership, phase, status, dates, work orders, events, condition, inspection, level of service, and changes are tracked throughout the asset lifecycle from plan to deposition within Infor EAM. This history follows the asset even as it is transferred between locations, agencies, facilities, and other areas of responsibility.

4.2.1.8 Vendor's proposed solution should support WVDOT in achieving operational excellence in termsof the Fueling process as follows:

- **Accurately track the fuel usage and cost history of all State-owned equipment and vehicles by vehicle.**

Infor Response:

History of attributes, preventive maintenance, fuel usage, costs, utilization rates, ownership, work orders, events, condition, inspection, fluid levels, and other components are tracked throughout the equipment, vehicle, and asset lifecycle from plan to deposition within Infor EAM. This history follows the asset even as it is transferred between locations, agencies, facilities, and other areas of responsibility.

- **Track all types of fueling transactions including automated bulk fueling transactions (currently tracked using the Fuel Master system), commercial fuel cards, and manual fueling transactions.**

Infor Response:

Fuel Management is included in the Infor EAM Fleet module and consists of several functions that help keep track of fuel, fluid, and fuel card inventory, transactions, and consumption. Infor EAM can also integrate to Fuel Master, wvOASIS, and other WVDOT existing solutions using the built-in integration tools.

- **Provide for the billing of fuel issues to other State Agencies.**

Infor Response:

Infor EAM can track all fuel transactions with the solution capturing the agency, department, employee, and other required data. Reports, billing, and other required analysis is subsequently supported and easily configurable by WVDOT in Infor EAM.

4.2.1.9 Vendor's proposed solution should support WVDOT in managing the full asset lifecycle and in prioritizing assets for replacement as follows:

- **Support managing of fleet and equipment cost allocation and in conjunction with wvOASISsupport billing for equipment usage.**

Infor Response:

Infor EAM tracks all costs, usage, and other components associated with its assets. Infor EAM can synchronize this data with wvOASIS for billing using built-in integration tools.

- **Plan for retirement/replacement of equipment and the acquisition of equipment.**

Infor Response:

With EAM equipment evaluation WVDOT can base replacement decisions on the 'complete picture'. Mostly replacement decisions are solely based on maintenance (PM and breakdown) costs. The inclusion of equipment operational costs and strategies like energy consumption, criticality, and Predictive Analytics into the "replace or Repair" equation can lead to a more complete picture and may result in a replace decision when the maintenance costs alone result in a repair decision.

Infor EAM equipment evaluation can filter out all the assets that apply to the ROI analysis for potential replacement and analyze the actual age and cost data from the existing installed assets. Infor EAM equipment evaluation then calculates the potential annual savings based on maintenance costs and

energy efficiency and calculates the ROI. If no savings or ROI is found, then it wouldn't be cost effective to replace the asset. Graphical reports can be created to show justification. Reports can be saved for attachment to a Capital Planning Request.

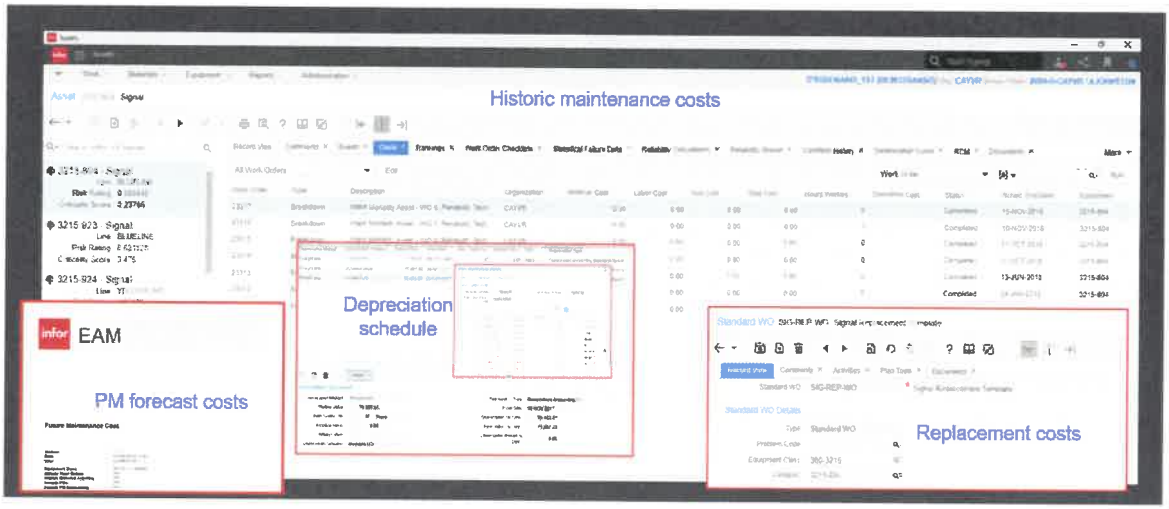


Figure 8.15 - Infor EAM Costs and Forecasts

- **Manage asset ownership assignments and transfers during the lifecycle of the assets.**

Infor Response:

Changes to ownership, assignment, agency, department, and other transfers are tracked throughout the asset lifecycle in Infor EAM. History of all work orders, costs, attributes, and other data is maintained throughout all changes.

- **Manage disposal/retirement of equipment in conjunction with the wvOASIS fixed assetsmodule.**

Infor Response:

Final disposition of assets can be captured in Infor EAM with data synchronized to wvOASIS using built-in integration tools.

9-Capabilities of Proposed VPS Solution

4.2.2.3 Fleet and Equipment Management Functional Requirements

The VPS shall support short-term and long-term maintenance planning, including scheduling work orders,projecting resource requirements (labor, material, etc.), and highlighting labor, parts, or capacity shortagesor excesses. In addition, the system shall be fully integrated with the Consumable Inventory module in wvOASIS. The key capabilities required of the VPS are described in further detail below.

Infor Response:

Infor EAM Work Order planning provides visibility to the schedule and availability of the resources. It allows management of the resources through drag and drop scheduling of the work to the available resources considering the other attributes of the employee including trade, shift, and qualifications. The attributes are used to determine if the employee can be assigned to the work orders that need a resource. For example, if the employee is an electrical trade then Work Order scheduling will not show that employee as an available option for a mechanical work order. Or if the work order is electrical but requires specific qualifications like confined space then only electrical trade employees that are qualified for confined space will be presented as available resources.

Infor EAM supports multiple levels of scheduling. Once work orders whether PM, Corrective, Breakdown, or any type of work order that your business requires are created, you can schedule those to be done. Scheduling can be as simple as assigning a single work order to a resource to using a multi-week calendar view to assign work orders to resources on specific days.

Infor EAM Work Order Daily Scheduling allows WVDOT to see all the work order activities, resources, and the number of weeks out that you would like to schedule. It lets users drag a work order activity to a specific resource and date that they want to schedule for that work order. Users can repeat this drag and drop process until they complete the scheduling. Once complete they can approve the schedule and release the work order to the resources. If anything affects the schedule, then they can go back and drag and drop to adjust the schedule.

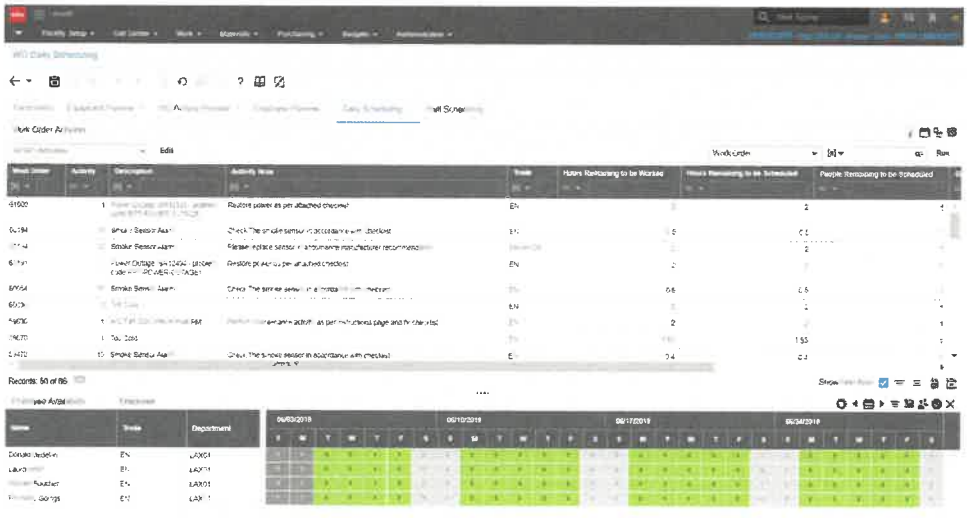


Figure 9.1 - Infor EAM Daily Work Scheduling

Infor EAM includes Capital Project capability as part of the asset lifecycle and project management functionality. Infor EAM equipment evaluation allows WVDOT to base replacement decisions on maintenance (PM and breakdown) costs and can include equipment operational costs like energy consumption. This complete evaluation leads to a more complete picture and may cause equipment not ready for replacement based on the maintenance costs alone to become a replacement candidate due to the operational cost difference with the replacement equipment.

Capital Performance Evaluation displays for the selected equipment the outstanding capital request values for the selected period and for the future period. Infor EAM equipment evaluation then calculates the potential annual savings based on maintenance costs and energy efficiency and calculates the ROI. Graphical reports can be created to show justification. Reports can be saved for attachment to a Capital Planning Request.

Capital Planning Requests allow WVDOT to create and manage future capital investment requests. WVDOT will be able to track capital expense requests based on forecasted labor costs, forecasted material costs, and expected cost avoidance. Using this facility, WVDOT may track a request for a capital expenditure, and then create a work order for that capital expense. This includes categorization codes and user-defined fields to increase flexibility. A capital project can be created directly from the capital planning request upon approval.

Infor EAM can synchronize data with wvOASIS using the built-in integration tools.

4.2.2.3.1 Asset Inventory/Asset Registry

Asset Inventory/Asset Registry capabilities shall support entry, tracking, and management of all types of fleet and equipment units in a single enterprise inventory including, but not limited to passenger vehicles;light duty trucks; maintenance and construction equipment; specialty tools and equipment; West VirginiaState Rail Authority rolling stock and work equipment and other fleet classes/types as WVDOT may acquire. Asset Inventory/Asset Registry functionality shall include:

- **Asset Inventory: Uniquely identify and define each WVDOT fleet or equipment asset in a Fleet and Equipment asset inventory and store asset attribute and reference information for each asset.**

Infor Response:

Infor EAM asset management module provides an efficient and effective method for managing all WVDOT physical assets. Infor EAM tracks events of assets, including structure change, movement, maintenance. These assets can be widely distributed, fixed, moveable, or rolling stock, and they can be moved to new locations, replaced, swapped, and removed for repairs. Infor EAM allows users to record, maintain, structure, and standardize physical asset information. The asset management module holds the identity, configuration, and structure of physical assets as well as their complete technical and commercial configurations. WVDOT can also capture any user defined fields and values on assets within the solution. Asset information maintained within Infor EAM single asset registry is available to ALL integrated modules throughout the solution from Work Management and Inspection to Capital Planning and Procurement.

- **Leasing and Financing: Store lease/rental information for any fleet units which are leased by WVDOT, integrate with the State of West Virginia wvOASIS Advantage Financials accounts payable function to automatically generate payment request for monthly or other recurring payments for leasedor financed vehicles, and store financing information.**

Infor Response:

Infor EAM can track required lease and rental information within the solution with configurability by WVDOT to ensure required attributes are captured. Infor EAM can synchronize data with wvOASIS using the built-in integration tools.

- **Licenses and Permits: Store and track annual registration/license/pennit/emission renewals for vehicles and other motorized equipment separate from preventive maintenance services including registration/license/permit type, date of expiration and renewal and associated fees.**

Infor Response:

Infor EAM resource management includes the creation of information such as supervisors, qualifications, trades, employees, shifts, and crews. The employee record includes hourly rates based on type of hours (i.e., regular, overtime), availability exceptions (i.e., vacation), and qualifications. Employees are associated to trades, crews, and shifts. Certifications, licenses,

permits; training, skills, and qualifications can be tracked within the solution with notifications configured in anticipation of upcoming expiration or renewal dates. This information can be created directly within Infor EAM or imported from an HR system.

- **Service Call and Incident Tracking: Capture and track information on incidents involving WVDOT fleet and equipment assets. Incidents can include accidents or other vandalism, tire blowouts, any non-- accident-related item that could lead to a work order or log a work request.**

Infor Response:

The Infor EAM service request portal allows a WVDOT customer to request service. The requestor can see the status of their requests and can see work orders on assets if they are given that view. Once the call has been entered into the Infor EAM Call Center, the dispatcher can easily create a work order right on the same screen. The dispatcher can identify the asset through a built-in GIS map search, choose the appropriate knowledge base item (service codes, documents, etc.), and issue the work request to the appropriate department as established by the configured workflow. Service requests spawn approved work orders when approved. The service request can close automatically when the work order is closed and send a notification with customer survey to the requestor. Infor EAM Case Management can track all work orders, documents, costs, regulatory elements, and other components associated within any incidents, accidents, disasters, or other major events that occur.

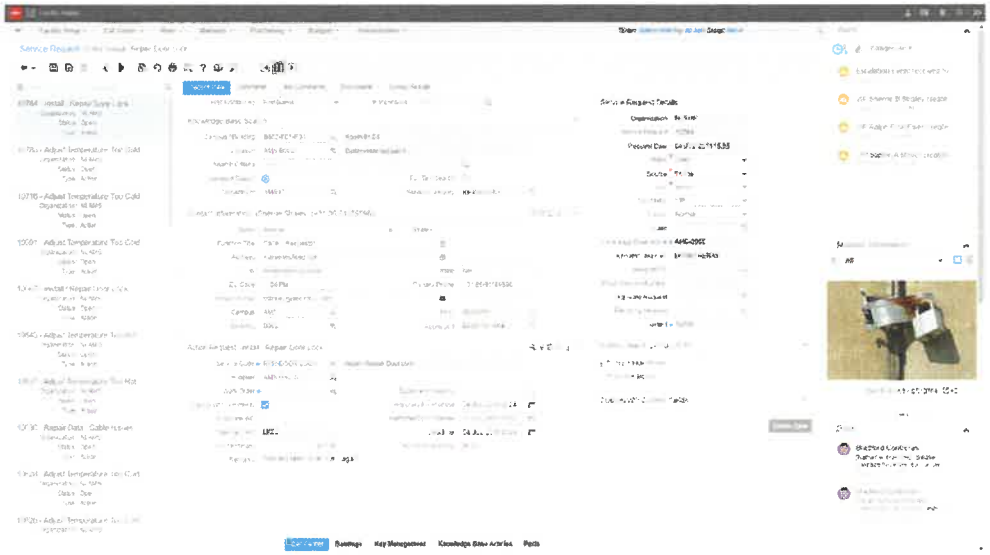


Figure 9.2 - Infor EAM Request and Dispatch Screen

- **AVL Integration: Provide the capability to integrate with CAD AVL equipment and system(s) to allow for viewing vehicle activity history including operator, activity, location and date and time ofactivity.**

Infor Response:

Infor EAM can be integrated with CAD AVL solutions using built-in integration tools.

- **Fuel Management: Maintain inventory of fuel cards and track various other fuel management attributes including fuel type (account for gas, diesel, CNG, electric, multiple fuel types and capacities), equipment information such as operator, vehicle, etc., tank capacity, and fuel card expiration dates. Support integration with Fuel Master to track fuel usage by each fleet and equipmentasset.**

Infor Response:

Fuel Management is included in the Infor EAM Fleet module and consists of several functions that help keep track of fuel, fluid, and fuel card inventory, transactions, and consumption. Infor EAM can

also integrate to Fuel Master, wvOASIS, and other WVDOT existing solutions using the built-in integration tools.

- **Work Management Integration: Integrate with the work management functions and the wvOASIS Advantage Financials application to obtain vehicle and equipment usage information entered by WVDOT staff on work orders and update the vehicle inventory information with the mileage or hoursutilized as appropriate.**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **Tire Management: Maintain reference information specific to tires for each tire, including equipment tire is installed, brand, model, type, dimensions, lifecycle tread usage cumulative acrossinstalled equipment, etc.**

Infor Response:

WVDOT can also benefit from pinpoint tracking — capture data for each tire, such as ID, description, accrued cost, and work order history for each vehicle to better manage tire assets. All casing through the re-treading process can be tracked, crediting the unused portion of tire life to vehicle history.

- **Availability, Usage and Downtime: Automatically update and track the real-time status and availability for service for all assets.**

Infor Response:

Infor EAM provides real-time tracking to asset, resource, and tools availability in the solution capturing all associated maintenance, usage, and downtime data.

- **Motor Pool: Set-up and manage one or more motor pools. The system should provide reservation functionality and/or provide the ability to integrate with a reservation system and a telematics solutionas well as integration with the wvOASIS ERP to track and manage usage and cost information for reservations to state staff external to the owning department staff.**

Infor Response:

Infor EAM supports Motor Pool functionality for the vehicle inventory within the solution. As Infor EAM is an integrated solution, updates to equipment inventory are reflected in the Motor Pool screens. Infor EAM can track vehicle usage and supports the capability of vehicle loan or rental. Infor EAM also supports contracts, leasing, and pricing for billing departments, users, and other entities for vehicle usage. Infor EAM can also be integrated with wvOASIS using the built-in integration tools.

- **Maintenance History: Maintain operating and maintenance history detail for all assets.**

Infor Response:

History of asset attributes, preventive maintenance, value, location, hierarchy, costs, utilization rates, ownership, phase, status, dates, work orders, events, condition, inspection, level of service, and changes are tracked throughout the asset lifecycle from plan to deposition within Infor EAM. This history follows the asset even as it is transferred between locations, agencies, facilities, and other areas of responsibility.

- **Performance Analysis: Support defining and tracking asset performance and performing analysisrelating to all information available in the system.**

Infor Response:

If not addressed in the over 200+ Standard Reports available with Infor EAM, WVDOT can configure the required reports and analysis using the built-in Advanced Reporting solution tools. Additionally, the Infor EAM Start Center Dashboard allows users to configure Inboxes, Charts, and KPIs to provide quick insight and access to asset; work order, and operational information that meet WVDOT needs.

- **Acquisition, Replacement and Surplus: Track detailed information on the acquisition and replacement of both purchased and constructed assets.**

Infor Response:

Required attributes, data, usage, costs, and WVDOT defined data is tracked and configurable within Infor EAM throughout the asset lifecycle from acquisition to surplus.

- **Fleet and Asset Planning: Define parameters for long term fleet planning projections such as specific series and models of vehicles, number of vehicles in each series, planned maintenance jobsfor vehicles and assets including standard labor hours and maintenance frequency, etc.**

Infor Response:

Maintenance patterns in Infor EAM allow WVDOT to define a schedule of predefined jobs, which have a pre-determined sequence, and are serially generated for a selected list of assets. This pattern identifies when a job should occur, how the system should generate Work Orders for the maintenance pattern and whether the resulting Maintenance Work Order generation is based primarily on a time interval, on a meter interval (i.e.: vehicle miles) or both.

The Inspection Management module within Infor EAM works in concert with the Work and Asset Management modules to give WVDOT more control over condition monitoring. These modules also allow for the automatic generation of corrective and predictive work actions when an inspection result exceeds a preset limit. Additionally, Infor EAM can be integrated with IoT devices to continually monitor condition and trigger the required work to be performed. Alert Management constantly analyzes and correlates data over time, including operational parameters, energy consumption, and degree days, to detect variance trends that reduce an asset's performance—availability, reliability, and quality—and detect whether assets are using more energy than expected. Once a variance trend occurs, the system sends email notifications or creates a work order to take corrective action.

With this actionable data, maintenance staff can automate maintenance as well as collaborate with production to efficiently coordinate ad hoc, batch, and automatic scheduling of production and maintenance jobs. They will be able to handle issues and exceptions correctly the first time, continuously improving response time and productivity.

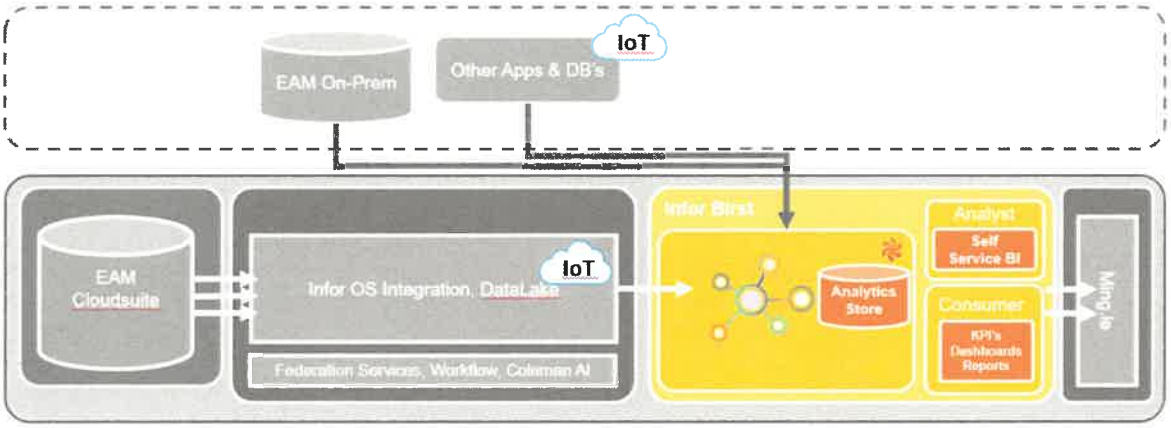


Figure 9.3 – Reports and Alerts

- **Costing and Billing: Support allocation of vehicle operating cost to projects, grants, and overheadaccounts.**

Infor Response:

The Infor EAM budget management module helps WVDOT establish budgets and capture all costs related to maintenance expenditures for specific, user-defined time periods. Infor EAM budgeting enables the creation of hierarchical budget account codes by maintenance entity (e.g., cost type, department, and asset). Actual planned and estimated costs can be captured at any level by time period, enabling the efficient monitoring and control of expenditures. Budget management maintains the details of all work orders and purchase orders by budget account codes, allowing analysis of all current and planned expenditures.

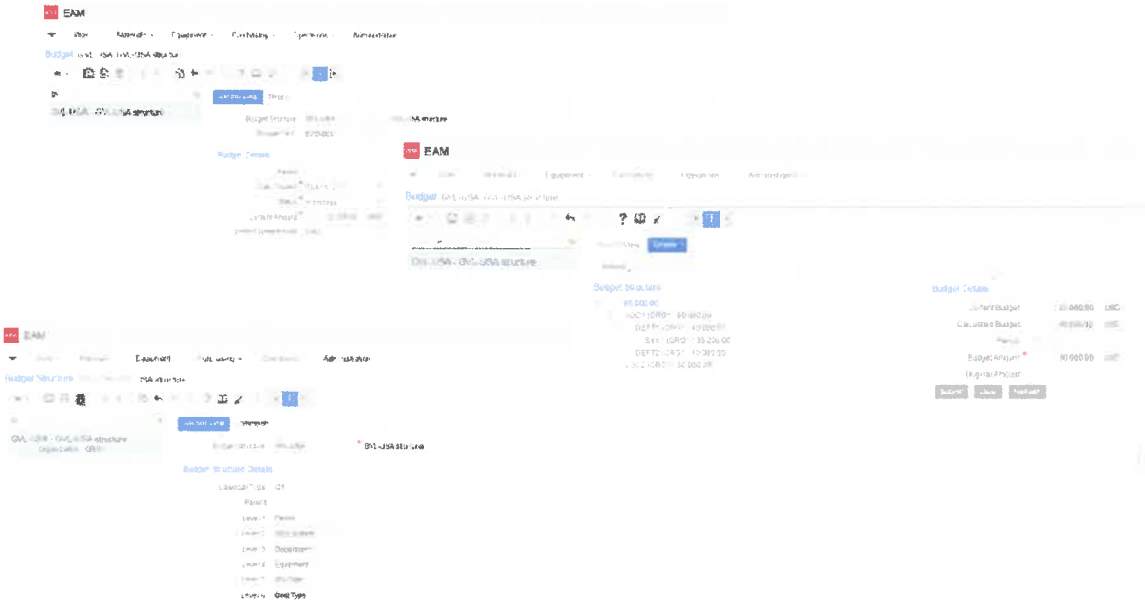


Figure 9.4 - Infor EAM Budget Management Screens

4.2.2.3. 2 Work Management

The Work Management function shall provide a work planning and management solution that will support the identification of potential issues through a work request process and the planning, scheduling,management and tracking of various maintenance management activities performed by WVDOT on the range of fleet and equipment asset classes. Work management capabilities shall include:

- **Problem Reporting: Provide an Intranet based capability for an employee to report issues related tofleet and equipment assets.**

Infor Response:

The Infor EAM service request portal allows a WVDOT customer to request service. The requestor can see the status of their requests and can see work orders on assets if they are given that view. Once the call has been entered into the Infor EAM Call Center, the dispatcher can easily create a work order right on the same screen. The dispatcher can identify the asset through a built-in GIS map search, choose the appropriate knowledge base item (service codes, documents, etc.), and issue the work request to the appropriate department as established by the configured workflow. Service requests spawn approved work orders when approved. The service request can close automatically when the work order is closed and send a notification with customer survey to the requestor.

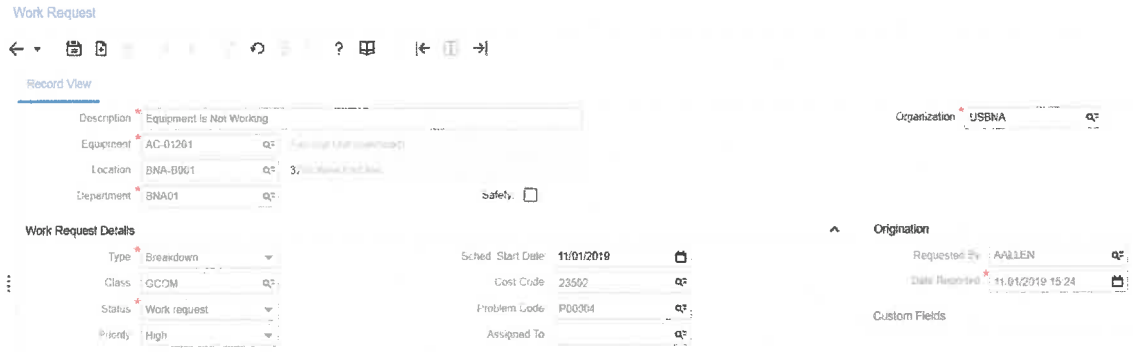


Figure 9.5 - Infor EAM Work Request Screen

The optional EAM Mobile Rapid Request application allows external users to download the application to a smart phone and create service requests without logging into the system. The user can record the GPS location, a description, comments, and contact information. The user can also add photos if they desire. The service request data is recorded in the call center where work orders or incidents can be created from the request. The user can view the statuses of the requests that they submit.

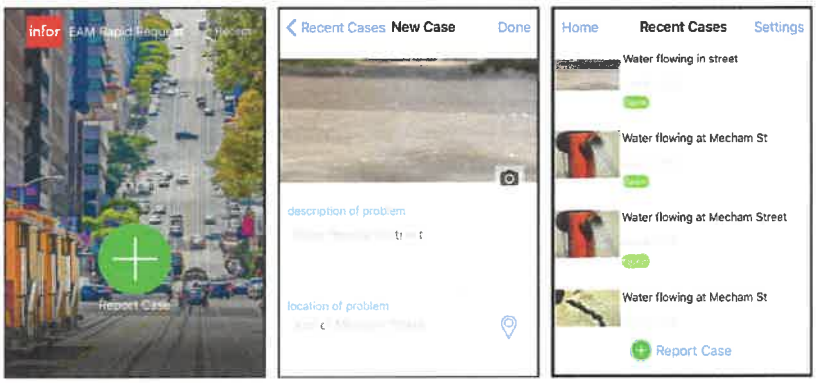


Figure 9.6 - Infor EAM Rapid Request

- **Reporting and Managing Problems, Work Requests: Automatically generate work requests (problem reports/defects) if usage, meter readings, and other condition measurements deviate from pre-defined tolerances for an asset or if a pre-defined event occurs; manually generate work requests from manual sources such as defects found during preventive maintenance, operator vehicle conditionreports. Work Orders are created from Work Requests if the request is approved.**

Infor Response:

In addition to the Service Request capabilities described in the previous section, condition information on assets within Infor EAM can be automatically updated through integration with monitoring devices or captured using field inspections/assessments scheduled on a regular basis. WVDOT users can execute inspection work orders ad-hoc or triggered by time frequency and/or meters (calendar- or meter-based inspection). Additionally, users can generate inspection work orders based on previous inspection results (condition-based inspections). Condition data captured can be constantly monitored within Infor EAM and corrective work activities automatically scheduled when certain condition limits are met using the Alert Management capabilities within the solution.

Alert Management is a function in Infor EAM that can search the database for specific data and then send email or create work orders based on the analysis and interpretation of that data. WVDOT can use Alert Management to notify users of high energy consumption, equipment conditions like vibration or temperatures, and can use it to support workflow (notify an approver there are work request awaiting approval), escalation (notify a supervisor the that same request has been waiting for

approval for more than a week), etc. Alerts run at a predefined frequency, so they are ideal for anything that does not need immediate action. This way Alert Management is complementing the E-Mail Messenger function of Infor EAM that only supports event driven (synchronous) emails.

The alert management function uses the user defined grid function of Infor EAM and as such can search for any data available in or accessible to the EAM database, whether native or not. Define an alert using any predefined user defined grids. Specify a frequency in which users want the alert to run, e.g., once a week, twice an hour, etc. After defining the grid to be used on the alert additional Dataspies (queries) can be created to further limit the data alerted on. Other features of the Alert Management function include:

- Create a work order for every alert record found, based on an assigned standard work order.
- Send an email for every alert record found, based on an assigned email template. Note: there can be an alert do both actions: create a work order and send an email.
- Before and after the alert WVDOT can run specific logic. For example, before the alert runs, prepare records for the alert by populating a temporary table with data. Then after the alert has run, remove the records from this temporary table. There are obviously lots of other possible uses for this powerful feature.
- Build in a delay feature. If an alert finds a condition that requires an email or a work order, obviously the next time that alert runs, it may find the same condition, especially if the interval between runs is short. To avoid repetitive emails or work orders for the same issue a delay can be configured that stops the alert from issuing for a defined amount of time.
- On the history tab users can find the history of email and work orders created by the alert.

- **Planned/Preventive Maintenance Program Management: Define and maintain a Planned / Preventive Maintenance program for each fleet and equipment asset and/or sub-assets asset types, asset model, class or series using a library of standard preventive maintenance job templates for jobs included in the preventive maintenance program with defined intervals for performing each job. If thepreventive maintenance is required by external directive, provide indication on the preventive maintenance work order of the originating source (local, state, federal agency). Provide comprehensive and detailed history of asset usage, maintenance, performance, and cost to support effective asset management throughout the entire asset life cycle.**

Infor Response:

The Infor EAM Work Management module helps WVDOT manage, plan, and monitor work and the resources necessary to complete work. With this module users can define work information such as supervisors, permits, qualifications, trades, employees, shifts, tasks, labor, safety, checklists, tools, material lists, and VMRS codes. Users can create standard work orders, and then apply the information from standard work orders to regular work orders. Users can create regular work orders to repair equipment, modify equipment to meet safety and environmental standards, perform work orders, and record information concerning equipment problems. Users can also add activities to work orders, schedule labor, associate qualifications with work order activities, book labor and vendor hours, associate parts, enter meter readings, create child work orders, add permits, and request tools as necessary. Users can easily view the status of work orders and view work order information such as cost and service request details and close the work order after the work is complete. Work orders can be color coded based on priority, status, and other fields within the Infor EAM solution.

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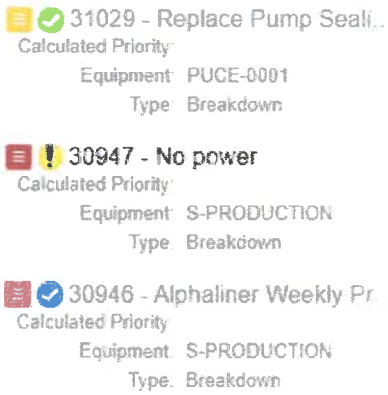


Figure 9.7 - Infor EAM Work Order Color Coding

Using Infor EAM, WVDOT users can create Preventative Maintenance (PM) tasks based on a fixed date, perform on day, flexible time-period or metered usage. Users may incorporate routes with a PM task to service multiple assets that share similar PM requirements under a single work order. Infor EAM can automatically adjust PM schedules to compensate for early or late PM work accomplishment. Infor EAM also offers PM Revision Control to track modifications and control the authorization of modifications to PM scheduled task, materials, and routes. PM Forecasting provides the ability to visualize and balance the PM workload across a data range based on staffing levels or workday requirements.

WVDOT can manage its work order schedules with this module by viewing current work order schedules, determining labor and parts availability, and analyzing labor utilization. Users may schedule planned or backlogged work orders or reschedule work orders as necessary. Additionally, users can view work order comments, change work order status, and freeze or unfreeze activity schedules while balancing the workload. The Infor EAM Work Management module interacts seamlessly with other modules within Infor EAM to facilitate comprehensive work management.

- **Major Overhauls, Asset Rehab and Campaigns: Provide the capability to define and track major maintenance programs (e.g., overhauls) consisting of a series of maintenance jobs to be completed fora single asset, or specific asset groupings, models or series, or location performed on user defined scheduling criteria. As with regular maintenance, WVDOT requires complete and detailed tracking ofthe actual work performed, costs, and resources consumed for each action performed on each asset.**

Infor Response:

Infor EAM allows WVDOT to manage Campaigns within the solution. A Campaign tracks the work performed for a specific project which could include but is not limited to recalls, bulletins, and retrofits. Examples are a project to replace a part that has been recalled or a project to retrofit a train. Campaigns usually have two phases: the first phase is an impact analysis of what assets/equipment/parts are affected and the second phase performs the desired activities on those elements.

Infor EAM has the flexibility to place all the equipment affected by the campaign on one survey work order or the list of equipment may be broken up into separate survey work orders. Once the survey has been performed, non-conforming equipment, equipment that failed the survey, or equipment that meets the qualifications of the campaign may now have the appropriate work orders created to address the campaign requirements.

- **Maintenance Standard Job Definition: Define standard maintenance job templates to predefine aspecific scope of work for specific asset classes or asset types, including the specification of a job code, labor hours, skills, materials, and equipment needed to perform a job.**

Infor Response:

In the Infor EAM work management module, work requests are manually generated by request or automatically generated by the system (planned work orders). After appropriate screening and authorization, requests become approved work orders and are dispatched for action. A standard work order library simplifies initiation of frequently performed work. With the work management module, users can perform the following tasks:

- Schedule non-routine maintenance for asset breakdowns, capital work, and asset relocation. Infor EAM allows users to enter work order detail information even after the work is completed.
- Work Order Daily Scheduling
- Generate standing work orders for routine or lubrication work including routing for efficient execution
- Set up routine, preventive maintenance based on fixed calendar dates, meter readings, fixed or changing frequencies depending on thresholds, and dormant periods
- Track claims and warranties at activity and work order level
- Easily initiate frequently performed work orders
- Quick entry Work Orders
- Tool planning

- **Maintenance Resource Definition: Define specific maintenance locations, shops, and facilities anda list of maintenance work to be performed at each facility; indicate the specific assets maintained at each facility and the equipment at the location as well as the labor resources available by labor classification.**

Infor Response:

With the Infor EAM multi-organization security (MOS) and multi-currency features, WVDOT can create multiple secured databases (organizations) while maintaining one physical database. Administrators can assign users to one or more organizations and then assign different roles, security levels, and approval limits for each organization. Users can view and influence "common" data (information accessible by all users regardless of organization) and the data of the organizations of which they are members.

Figure 9.8 - Infor EAM Multi-Organizational Capability

Hierarchy

The Infor EAM asset management module gives WVDOT the flexibility to establish physical assets according to its own asset structure. Infor EAM provides the following asset structure options:

- Asset identifiers
- Hierarchical structures of unlimited complexity
- Unlimited number of asset parent/child relationships
- Grouping of assets by system location, such as a process line or electrical circuit
- Choice of functional position (one or more physical assets per position) or tag numbers (one physical asset per functional position)
- Bill of materials, such as a list of parts that may be required for the repair of a physical asset
- Indicators to configure cost roll-up
- Positions, Location and Systems support

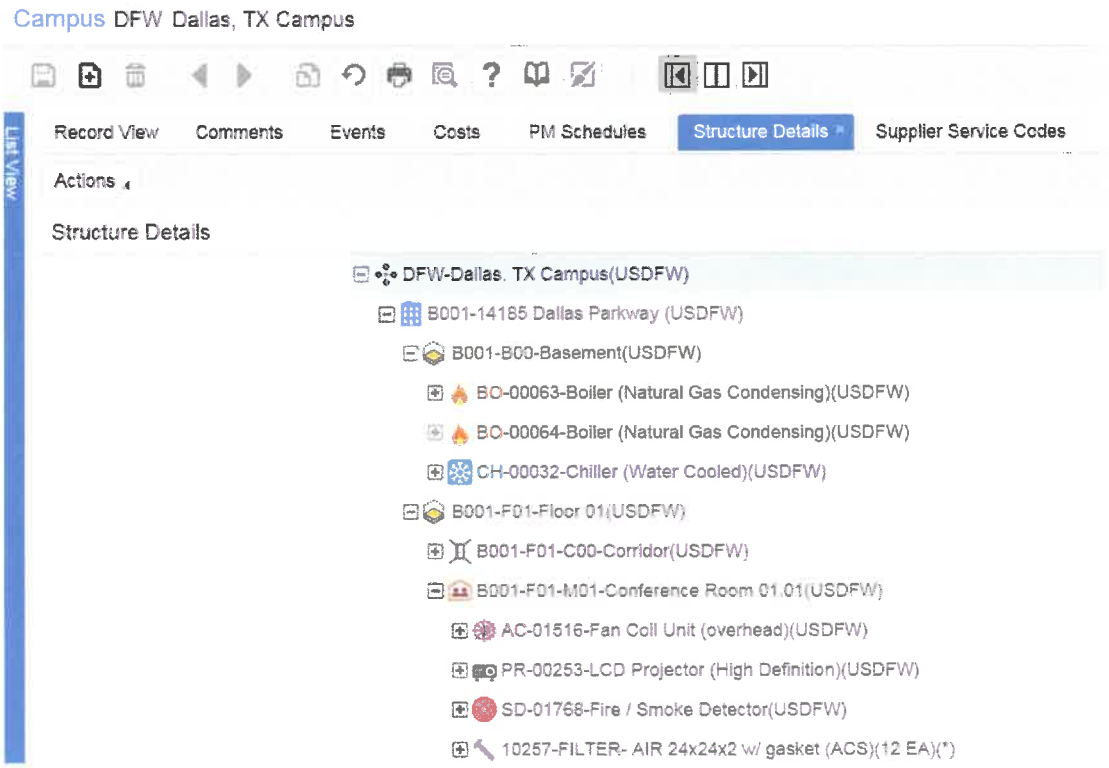


Figure 9.9 - Infor EAM Asset Hierarchy

- **Work Order Planning: Define maintenance work and resource requirements, schedule and assign work and resources, monitor work in process, capture information on work activity, and record workresults, including time and costs. Manage maintenance resources including WVDOT and contractor personnel, facilities, materials, and tools. Provide the ability to plan, monitor, and forecast annual work quantities and required resources (labor, equipment, material, and budget) for fleet and equipment assets at a program level.**

Infor Response:

Infor EAM Work Order planning provides visibility to the schedule and availability of the resources. It allows management of the resources through drag and drop scheduling of the work to the available resources considering the other attributes of the employee including trade, shift, and qualifications. The attributes are used to determine if the employee can be assigned to the work orders that need a resource. For example, if the employee is an electrical trade then Work Order scheduling will not show that employee as an available option for a mechanical work order. Or if the work order is electrical but requires specific qualifications like confined space then only electrical trade employees that are qualified for confined space will be presented as available resources.

Infor EAM supports multiple levels of scheduling. Once work orders whether PM, Corrective, Breakdown, or any type of work order that your business requires are created, you can schedule those to be done. Scheduling can be as simple as assigning a single work order to a resource to using a multi-week calendar view to assign work orders to resources on specific days.

Infor EAM Work Order Daily Scheduling allows WVDOT to see all the work order activities, resources, and the number of weeks out that you would like to schedule. It lets users drag a work order activity to a specific resource and date that they want to schedule for that work order. Users can repeat this drag and drop process until they complete the scheduling. Once complete they can approve the schedule and release the work order to the resources. If anything affects the schedule, then they can go back and drag and drop to adjust the schedule.

With Infor EAM Optiimized Scheduler, WVDOT can automate the assignment of work orders and activities based on business requirements, desired outcomes, and constraints. You'll be able to streamline the management of large numbers of field employees across wide geographic locations by ordering and ranking dispatch plans based on specific priorities, staff skills, crew availability, and worker proximity to their assignments. Scheduling, which used to take hours, now takes only minutes.

- **Work Order Description: Identify the fleet and equipment asset to which the work applies. Providethe ability to attach/access/retrieve standard asset documentation from the work order, including drawings, maintenance manuals, etc. Identify the reason for the work order, define the work to be done and the labor resources required, etc.**

Infor Response:

Infor EAM captures assets, materials, labor, costs, and other components on work orders within the solution. Photos, documents, videos, drawings, voice memos, links, compliance requirements, and other attachments can be associated with work orders and assets. Infor EAM provides the capability to capture safety related documents against assets and work orders including MSDS, manuals, emergency protocols, standard operating procedures, bulletins, permits, and training videos. Safety checklists can also be configured for work orders to ensure appropriate protocols are followed while completing maintenance work.

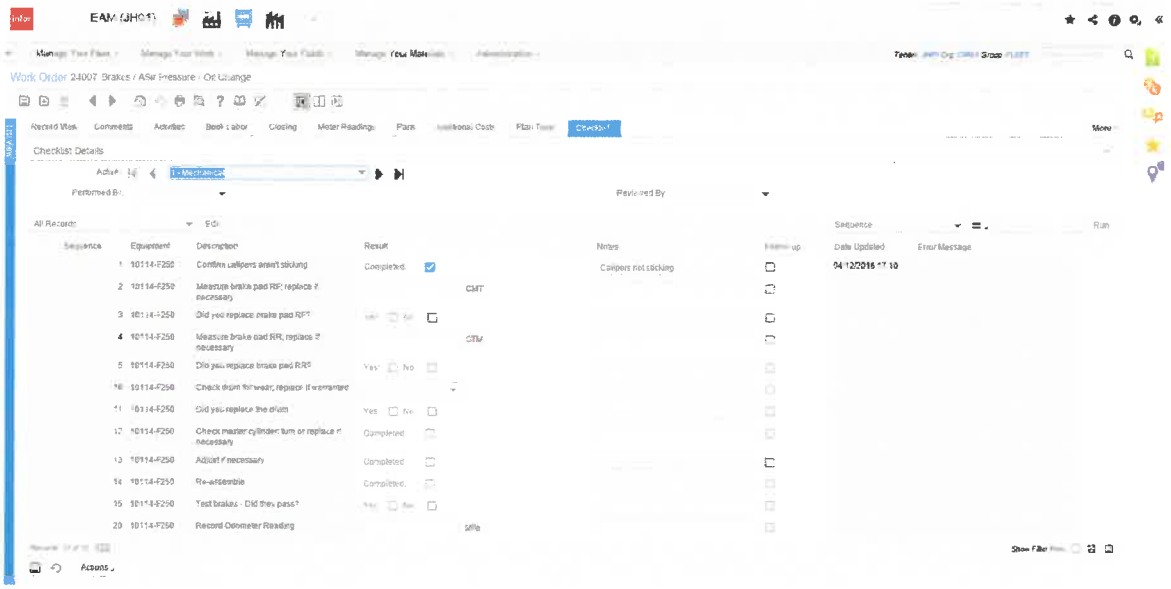


Figure 9.10- Infor EAM Checklist

- **Work Order Creation: Provide the capability to create work orders using several methods - on demand, from templates, from defects found during a preventive maintenance activity, as the result ofan incident, from a warranty failure, recall or service bulletin, etc.**

Infor Response:

Infor EAM supports creation of work orders by multiple methods from Service Requests and standard template libraries to incident management and recalls. Infor EAM Case Management can track all work orders, documents, costs, regulatory elements, and other components associated within any incidents, accidents, disasters, or other major events that occur. Infor EAM includes full warranty management on all assets. Warranty information including duration, start and expiration date can be added to an asset. When a work order is created for an Asset that is under warranty Infor EAM will alert the user. A warranty claim can be created to allow WVDOT to recoup costs or whatever the warranty allows. The Supplier record is used to manage and enter contract information. Information includes assets, services that are performed, rates by trade, hours of service and contract dates.

- **Work Activity Recording: Provide the capability for multiple individuals to work on multiple assetson a single work order and link specific work jobs or steps to a specific asset. Provide a method of allocating labor and material cost accurately to specific assets, with the cost then interfaced back to wvOASIS. Provide the capability to designate a work order as a service/road call, or link a work orderto a service/road call/incident event and to record travel time, service information (route, run, operator), road conditions, etc. Provide detailed description, classification, and reporting of asset failures by asset type, component, and system. Allow the ability to match repair codes to the reportedfailure. Support various maintenance failure analysis methods for developing asset/part modifications/replacements, adjustments to planned maintenance programs, and other actions tosupport continuous improvement of asset reliability and performance.**

Infor Response:

Infor EAM supports multi-asset work orders with multiple users able to address activities on work orders in accordance with access permissions, workflows, approvals, and business rules configurable by WVDOT to meet business needs. Information from Infor EAM can be synchronized with wvOASIS using the built-in integration tools.

Infor EAM Reliability Centered Maintenance (RCM) utilizes failure data and helps analyze equipment at risk. Infor EAM lets WVDOT define a Risk Assessment, Risk Analysis, Failure Mode Effects, and Criticality Analysis for a location, a system, a position, or an asset. During a Risk Assessment, users define functions, functional failures, and the consequences of these failures. A Risk Assessment is typically performed on locations and equipment on higher levels in the equipment hierarchy, such as a storage location or a production line. Doing a Risk Analysis allows the introduction of failure modes. Risk Analysis is more detailed research of the equipment risk and therefore is mostly done on equipment on lower levels in the equipment hierarchy.

To further reduce risk, Infor EAM offers equipment rankings that automatically recalculate a score and index on a regular defined interval. As many Equipment Rankings as required can be defined. They are separated in three main groups:

- Reliability Indexes
- Condition Indexes
- Facility Condition Indexes

Each equipment can be associated to multiple Equipment Rankings. A safety rank, versus an environment rank for example.

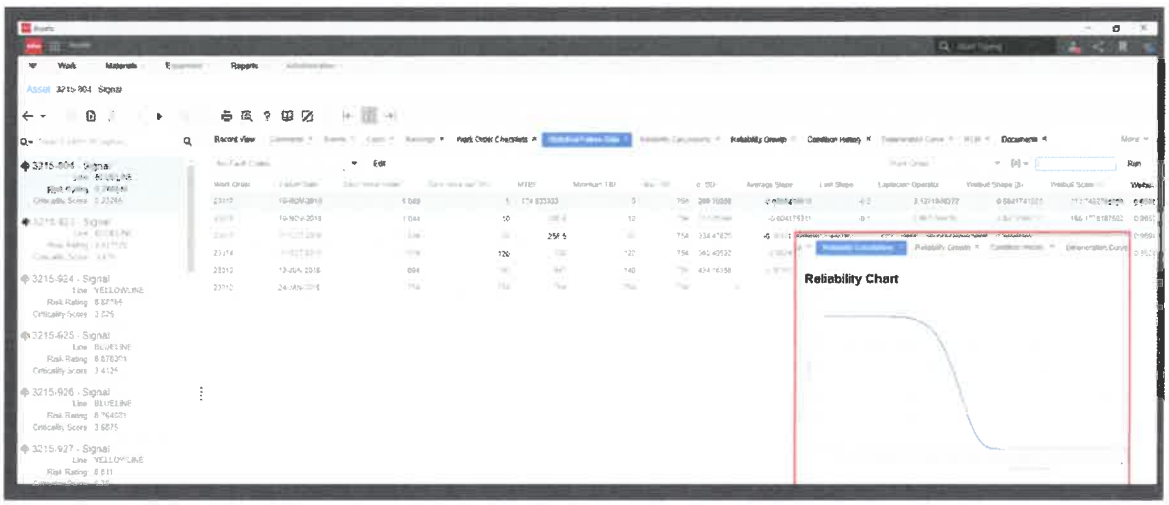


Figure 9.11 - Infor EAM Reliability Analysis

- **Work Activity Timekeeping: Provide the capability to integrate with wvOASIS Advantage Financials and Human Resource Management (HRM) to capture and track the actual time andassociated labor cost attributed to a work order.**

Infor Response:

Infor EAM can synchronize with wvOASIS time and activity data captured on work orders using the built-in integration tools.

- **Work Order Tracking and Monitoring: Provide real-time monitoring of work order status and provide information required to manage and adjust work as required, including the estimated time remaining on the work order (planned or estimated time less elapsed time). Other information may include but is not limited to percent complete based on the projected time to complete remaining tasks, current task or step being performed and the employee(s) currently assigned, number of taskscompleted and percentage, hours accumulated against each task, projected completion date/time, percent ahead or behind schedule based on actual labor versus standard for the job tasks or steps completed, accumulated cost detail, and current work order status.**

Infor Response:

Infor EAM provides real-time insight into the current work order status, utilization, productivity, activity, costs, and other operational parameters desired. If not addressed in the over 200+ Standard Reports available with Infor EAM, WVDOT can configure the required reports using the built-in Advanced Reporting solution tools. Additionally, the Infor EAM Start Center Dashboard allows users to configure Inboxes, Charts, and KPIs to provide quick insight and access to asset, work order, and operational information that meet WVDOT needs.

- **Work Order Closeout: Automatically calculate total work order costs and update asset maintenancehistory upon closing a work order.**

Infor Response:

Work order closeout functionality is supported in Infor EAM with workflows, approvals, alerts, notifications, and other components readily configurable by WVDOT. History of work order information is automatically captured and tracked against the associated assets.

- **Component Rebuild Management: Provide support to track components through the entire repair and rebuild cycle and maintain component operating and maintenance history. Provide the capabilityto manage and track the status, movement, and history of serialized components. Provide the capability to define major components, sub-components, assemblies, and sub-assemblies that will be individually tracked by serial number, or another unique ID.**

Infor Response:

Infor EAM tracks stocks of frequently used and critical spare parts in stores (storage locations). In many organizations, multiple stores are used so that an organization can delegate responsibility for parts to the appropriate employee and keep parts near where they will be used. Non-stocked materials are purchased directly from suppliers only when they are required. Repairable spares functionality aids in tracking repairs, either by suppliers or by WVDOT personnel, from replacement to repair and restocking as spare parts. Users can identify and track parts in Infor EAM that can be repaired and then reused. Create requisitions, quotations, purchase orders, and work orders for repairing broken parts by WVDOT employees or by suppliers. Automatically generate requisitions for repairable spares based on stock levels and number of spares waiting to be repaired. Track details about repairable spares, such as location, core value, and the number that could not be repaired (scrapped).

- **Handheld/Mobile/Tablet Devices: Provide support for work orders from handheld/mobile devices(create and perform).**

Infor Response:

WVDOT users can access the Infor EAM application through a standard Internet browser on any device from anywhere and at any time including Internet Explorer, Microsoft Edge, Google Chrome, and Safari. Infor EAM Mobile is a standalone mobile application that runs on iOS and Android. Infor EAM Mobile gives WVDOT maintenance technicians the tools they need to perform their work from a mobile device. This automates virtually every aspect of maintenance and data collection and allows users to create field-based work orders, use drill-down menus to retrieve detailed information about a piece of equipment and capture actual "wrench time" as work occurs.

Using a mobile device, such as a smartphone or a tablet, WVDOT users can view, add, update, and delete information and update the Infor EAM database without having to work from a fixed terminal. Infor EAM Mobile enables maintenance personnel to remain in the field or on the floor while maintaining their access to the information and Infor EAM functionality that they need to do their jobs on their mobile device. Infor EAM Mobile enables users to download work orders from the Infor EAM database to review and record performance data in the handheld device. Infor EAM Mobile work functionality enables users to perform the following actions:

- Create work requests and work orders
- View work order information, including task instructions, labor hours, parts, permits, attachments, and equipment details
- Add or update work order activities and activity hours
- Add, view, issue, and/or return work order activity required parts
- Enter comments and custom fields
- Update and close work orders
- Start, stop, and reset work order activities
- Distribute work based on assigning it at the header or activity level

Figure 9.12 – Mobile Capabilities

- **Management of Contractors: Manage inspection, maintenance, and work contracted out to a vendoror contractor; capture work details and cost. Monitor actual vendor or contractor performance versus service-level targets. Track performed warranty work for reimbursement. Manage repair and return of rebuilt assets, which requires the tracking of serialized components sent for repair (either the return ofthe same item or a replacement).**

Infor Response:

Infor EAM tracks the required vendor contact information, technicians, qualifications, and other WVDOT required information within the system. Infor EAM can show KPIs, charts and reports indicating performance trends for vendors.

Infor EAM can help WVDOT track all the costs incurred for contract services delivered to its customers. This includes maintenance costs, but also costs for fuel consumption, equipment usage, e.g., in the form of miles or hours, rent or lease and utility charges. These costs are then automatically included on periodically generated invoices for customers. A few of the Contract Management features within Infor EAM are summarized below.

Module	Features
Customer Contracts	Intended for long term contracts where invoices are generated throughout the contract period on a regular basis. Think of the lease or rental of equipment for the next two years or a maintenance contract for equipment for the next year. With Customer Contracts, WVDOT can perform the following tasks: • Define what costs must be charged and at what rates • Define the equipment, projects and work orders that compromise the contract • Define the frequency of invoicing
Rental Contracts	Intended for short term rental of equipment where the equipment is issued out to the customer for a period. Upon return of the equipment the customer will be invoiced for the usage period, miles or kilometers or any other unit of measure selected and possibly for other one-time charges. Invoicing is immediate at closing of the rental contract.
Contract Templates	Quickly create customer contracts or rental contracts based on pre-defined contract templates. Templates include all the charge definitions relevant for the actual contracts and therefore support fast entry and consistency.
Adjustments	Adjustments can be applied to both a customer contract and a rental contract. Examples are extra cleaning or repair after a vehicle rental or a credit because a customer has disputed a charge that was invoiced.
Customers	WVDOT can define all customers to which they provide services and with which they may have a contract.
Customer Invoices	Customer Invoices are automatically populated by the invoicing process. Invoices can be verified, and invoice quantities and amounts can be altered, if needed, before approving the invoice and submitting it to the customer.
Invoicing Process	The invoicing process is a daily process that automatically generates invoices for all contracts that have invoices due. The process handles both customer contracts and rental contracts.

- **Workforce Management: Integrate with the wvOASIS Advantage HRM module to obtain employeeinformation including status, vacations, training, and certification information. Store basic Information on workforce records, including job title, home location, job function, supervisor/shift, name, address, union affiliation, certifications, skills, all assigned assets including phones, cars, and uniforms, etc. Track training requirements.**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **Costing and Billing: Integrate with wvOASIS Advantage Financials to obtain the required actual cost data. Accumulate comprehensive maintenance costs by asset, type of work, and other breakdownsfor the purpose of providing input to capital and operating budgets, maintenance cost analysis, repair or replace decisions, internal versus external maintenance decisions, etc.**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

4.2.2.3.3 Warranty Management

The VPS shall identify asset, component, and parts warranties. The system should define warranty termsand conditions, and vendor or contractor responsibility for warranty service. The VPS should highlight work under warranty, identify and file warranty claims, and track warranty service and reimbursements. Warranty functionality shall include:

- **Work Management: Automatically generate and track warranty claims from the work order system based on user-defined business rules including what are warrantable repairs versus maintenance itemsand repairs not covered.**
- **Claims: Generate and track warranty claims from the work order system including claim number anddate, vehicle/asset/component, original cost (if applicable), RMA, repair cost, claim amount, text descriptions or notes, claim status (user defined categories), claim disposition and date, actual recovery amount or value received by WVDOT, type of disposition (e.g., reimbursement, replacementpart, credit toward future purchases, etc.), comments, etc.**
- **Payments/Reimbursements: Track warranty work performed by external contractors and vendors and automatically create claims for reimbursement if appropriate. Provide the ability to credit an assetor inventory based on reimbursement or other credit received in response to a warranty claim, to receive a replacement part or component into inventory at no cost, to track a credit against future purchases from the vendor, or to record vendor repairs under warranty for asset history.**

Infor Response:

Infor EAM includes full warranty management on all assets. Warranty information including duration, start and expiration date can be added to an asset. When a work order is created for an Asset that is under warranty Infor EAM will alert the user. A warranty claim can be created to allow WVDOT to recoup costs or whatever the warranty allows. The Supplier record is used to manage and enter contract information. Information includes assets, services that are performed, rates by trade, hours of service and contract dates.

Many suppliers provide a warranty on new equipment for a specific period. Infor EAM tracks asset warranties and processes warranty claims. For example, after defining warranty documents, WVDOT can associate warranties with equipment or parts. Then, update warranties as needed. If a part or piece of equipment breaks down or needs repair while under warranty, Infor EAM makes it easy to process a claim. Users can create warranties based upon either calendar periods or equipment usage or create warranties that are based upon both. For example, users can create a five-year, 50,000-mile warranty for an automobile in the fleet. If using dual warranty expiration criteria, Infor EAM automatically terminates a warranty whenever one of the expiration conditions is reached.

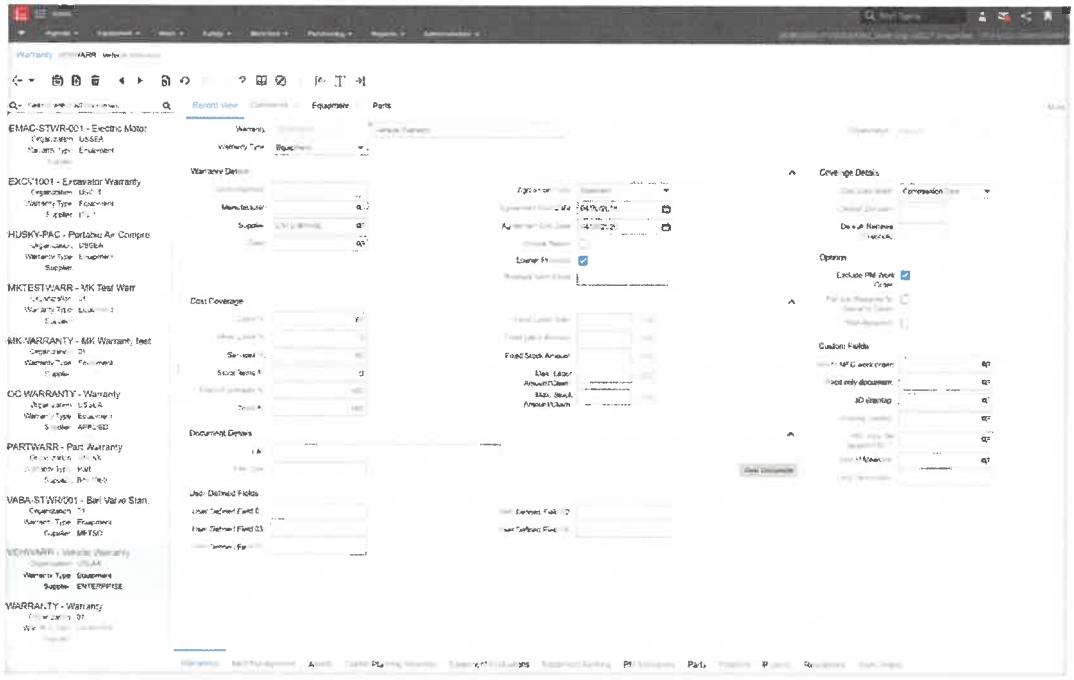


Figure 9.13 - Infor EAM Warranty Management

4.2.2.3.4 Planning and Budgeting

The VPS shall provide support for capital planning based on asset condition, criticality, performance orother criteria and plan for and identify funding needs and sources. Planning and budgeting functionality should include:

- **Performance Standards: Create and maintain performance guidelines based on user-definedbusiness rules for all work management activities.**

Infor Response:

Level of service is a key business driver and influences all Asset Performance Management decisions relating to the quality, reliability, responsiveness, sustainability, timeliness, accessibility, and cost considerations. In Infor EAM, in accordance with ISO 55001, WVDOT can define policies, strategies, and objectives. To judge whether objectives, strategies. or policies have reached their desired goals a little easier, records on the Objectives, Strategies, and Policies screens can all be associated to a ranking survey defined on the Equipment Rankings screen. The survey questions can be answered manually or automatically making this an easy and consistent process.

Asset performance is a concept that can be applied to a set of like assets within the same class or category for visibility of a portfolio of all assets within Infor EAM. Asset performance can be defined by WVDOT as a function of condition, operational capacity, reliability, and maintainability to include Asset Condition, Asset Operational Capacity, and Asset Reliability.

- **Operating Budget Development: Generate annual budgetary plans utilizing existing asset data andstandard work order templates to project labor and material needs.**

Infor Response:

The Infor EAM budget management module helps WVDOT establish budgets and capture all costs related to maintenance expenditures for specific, user-defined time periods. Infor EAM budgeting enables the creation of hierarchical budget account codes by maintenance entity (e.g., cost type, department, and asset). Actual planned and estimated costs can be captured at any level by time period, enabling the efficient monitoring and control of expenditures. Budget management maintains the details of all work orders and purchase orders by budget account codes, allowing analysis of all current and planned expenditures.

With the budget management module, WVDOT can perform the following tasks:

- Establish user-defined reporting periods
- Structure departments, systems, locations, positions, and assets to unlimited complexity
- Budget internal and contract hours, stock and non-stock materials, and work type

Expenditure and Position Identification

Identify estimated, committed, and actual costs and generate automatic updates from other Infor EAM modules. Infor EAM provides the following budget analysis options to help WVDOT identify its budget position:

- Compare between budgeted, estimated, committed, and actual costs
- Analyze budget based on period, year to date, or current trends
- Examine detailed expenditures, such as booked hours and materials ordered

Capital Planning Requests

Capital Planning Requests allow WVDOT to create and manage future capital investment requests. Users will be able to track capital expense requests based on forecasted labor costs, forecasted material costs, and expected cost avoidance. Using this facility, users may track a request for a capital expenditure, and then create a work order for that capital expense. This includes Categorization Codes and user-defined fields to increase flexibility.

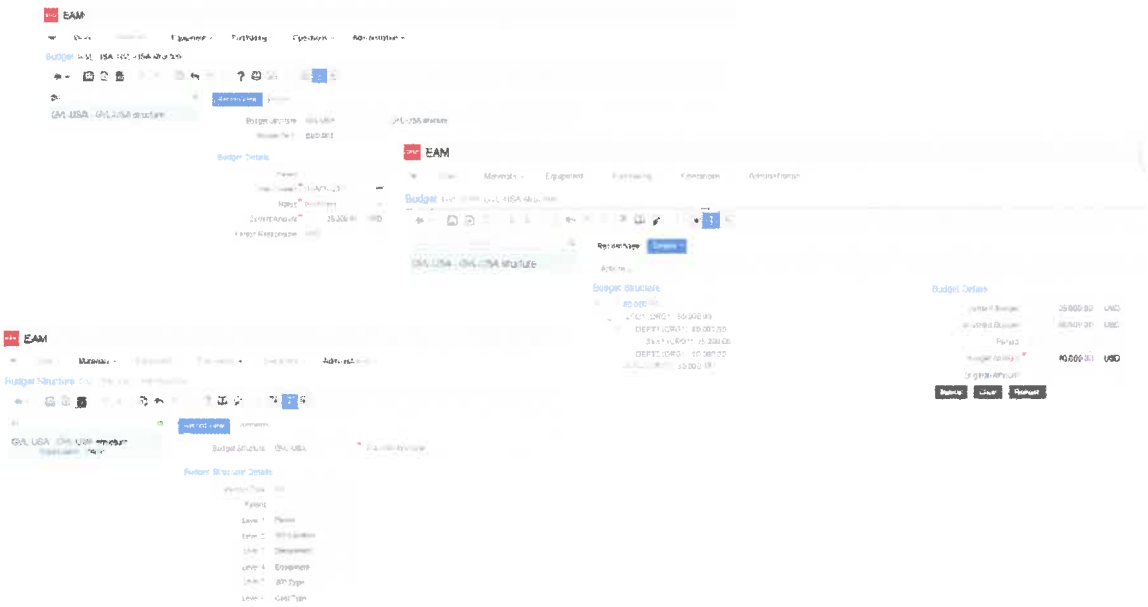


Figure 9.14 - Infor EAM Budget Management Screens

- **Operating and Maintenance History, Performance Analysis, and Costs: Maintain operating and maintenance history detail for all assets including problems posted, fuel/power and fluids consumption and operating costs, maintenance/rebuild work order detail, warranty claims, etc. Recordand track the source and category of funds used for acquisition, operations, and maintenance of a particular asset.**

Infor Response:

History of asset attributes, maintenance, fuel consumption, fluids, value, location, hierarchy, costs, utilization rates, performance, ownership, phase, status, dates, work orders, events, condition, inspection, level of service, and changes are tracked throughout the asset lifecycle from plan to

deposition within Infor EAM. This history follows the asset even as it is transferred between locations, agencies, facilities, and other areas of responsibility.
Infor EAM includes full warranty management on all assets. Warranty information including duration, start and expiration date can be added to an asset. When a work order is created for an Asset that is under warranty Infor EAM will alert the user. A warranty claim can be created to allow WVDOT to recoup costs or whatever the warranty allows. The Supplier record is used to manage and enter contract information. Information includes assets, services that are performed, rates by trade, hours of service and contract dates.

- **Long Term Maintenance Resource and Fleet/Asset Planning: Forecast asset disposal/retirementbased on user-defined criteria, such as mileage and/or other metrics, for user-defined time periods.**

Infor Response:

Infor EAM allows for any asset, condition, and cost data to be factored into the development of capital investment budget forecasts. Attributes including performance measures, condition values, installation dates, criticality, KPIs, and other factors can be configured within the budget forecasting formulas to provide more informed realistic decisions in asset investment planning. Infor EAM Reliability Centered Maintenance (RCM) lets you define either a Risk Assessment or a Risk Analysis for a location, a system, a position, or an asset. During a Risk Assessment you define functions, functional failures, and the consequences of these failures. A Risk Assessment is typically performed on locations and equipment on higher levels in the equipment hierarchy, such as a storage location or a production line. Doing a Risk Analysis allows the introduction of failure modes. Risk Analysis is more detailed research of the equipment risk and therefore is mostly done on equipment on lower levels in the equipment hierarchy.

To further reduce risk, Infor EAM offers equipment rankings that automatically recalculate a score and index on a regular defined interval. As many Equipment Rankings as required can be defined. They are separated in three main groups:

- Reliability Indexes
- Condition Indexes
- Facility Condition Indexes

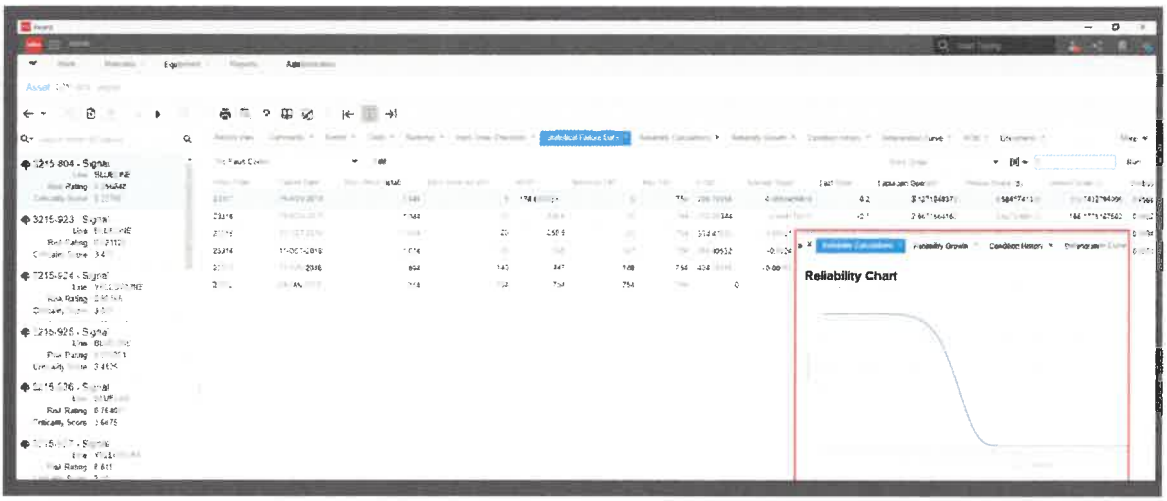


Figure 9.15 - Infor EAM Analysis

With EAM equipment evaluation WVDOT can base replacement decisions on the 'complete picture'. Mostly replacement decisions are solely based on maintenance (PM and breakdown) costs. The inclusion of equipment operational costs and strategies like energy consumption, criticality, and

Predictive Analytics into the "replace or Repair" equation can lead to a more complete picture and may result in a replace decision when the maintenance costs alone result in a repair decision.

Infor EAM equipment evaluation can filter out all the assets that apply to the ROI analysis for potential replacement and analyze the actual age and cost data from the existing installed assets. Infor EAM equipment evaluation then calculates the potential annual savings based on maintenance costs and energy efficiency and calculates the ROI. If no savings or ROI is found, then it wouldn't be cost effective to replace the asset. Graphical reports can be created to show justification. Reports can be saved for attachment to a Capital Planning Request.

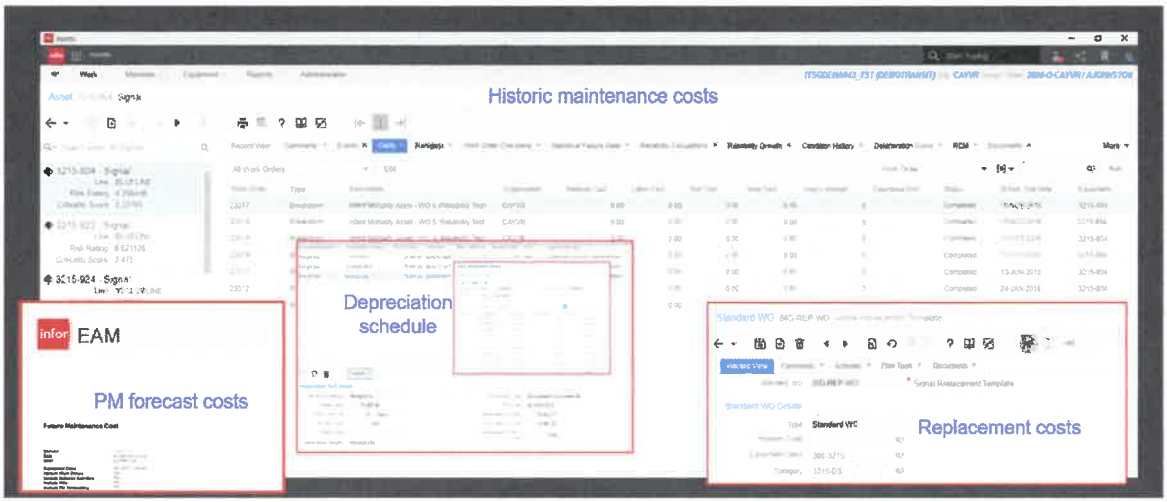


Figure 9.16- Infor EAM Costs and Forecasts

- **Capital Programming: Provide support for long term forecasting of capital needs.**

Infor Response:

Infor EAM includes Capital Project capability as part of the asset lifecycle and project management functionality. Infor EAM equipment evaluation allows WVDOT to base replacement decisions on maintenance (PM and breakdown) costs and can include equipment operational costs like energy consumption. This complete evaluation leads to a more complete picture and may cause equipment not ready for replacement based on the maintenance costs alone to become a replacement candidate due to the operational cost difference with the replacement equipment.

Capital Performance Evaluation displays for the selected equipment the outstanding capital request values for the selected period and for the future period. Infor EAM equipment evaluation then calculates the potential annual savings based on maintenance costs and energy efficiency and calculates the ROI. Graphical reports can be created to show justification. Reports can be saved for attachment to a Capital Planning Request.

Capital Planning Requests allow WVDOT to create and manage future capital investment requests. WVDOT will be able to track capital expense requests based on forecasted labor costs, forecasted material costs, and expected cost avoidance. Using this facility, WVDOT may track a request for a capital expenditure, and then create a work order for that capital expense. This includes categorization codes and user-defined fields to increase flexibility. A capital project can be created directly from the capital planning request upon approval.

4.2.2.3.5 System Integrations/Interfaces

Several interfaces will have to be designed and developed to support WVDOT's Fleet and Equipmentmanagement functionality. These interfaces include but are not limited to:

- **An interface with wvOASIS Advantage Financials Procurement module to initiate purchase requisitions in wvOASIS based on asset planning performed in the Fleet Management system;**

Infor Response:

Infor EAM has multiple ways that external data can be imported for processing, analysis, and initiating action. Data can be imported through user-initiated processes (e.g., from spreadsheets) using the built-in Infor EAM Import Utility. The Infor EAM Import Utility is a tool that uses Web services to insert or update selected tables in Infor EAM. This facilitates rapid insertion of data into the system without the need for manual data entry. For example, WVDOT users can now load 100,000-part items from a newly acquired warehouse in a matter of seconds. Data can also be automatically imported and exported through APIs and/or Web Services. Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **An interface with wvOASIS Advantage Financials Procurement and Fixed Assets module upon receipt and initiation of commissioning of the new fleet or equipment asset. The fleet and equipment asset record will be initially created in wvOASIS as the system of record for State of West Virginia assets and then interfaced to the Fleet Management System to create the fleet record in the VPS and allow WVDOT to enter additional information about the fleet/equipment asset beyond that maintainedin wvOASIS;**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **An interface with the West Virginia Board of Risk and Insurance Management (BRIM) to providevehicle information for risk management and insurance;**

Infor Response:

Infor EAM can be integrated with BRIM to synchronize data using built-in integration tools.

- **An interface with wvOASIS Advantage Financials and Human Resource Management to support set-up of repair orders as task orders in Advantage to allow employees to charge time to repair orders in Advantage Human Resource Management (HRM);**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **An interface with wvOASIS Advantage Financials to receive actual hours and labor costs for eachrepair order/task order back when payroll is processed;**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **An interface with wvOASIS Advantage Financials to obtain vehicle and equipment usage informationentered by WVDOT staff as part of time reporting in Advantage Human Resource Management (HRM);**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **A two-way interface with the Inventory module within wvOASIS Advantage Financials to supp01i tracking of inventory activity related to Fleet and Equipment operations (charge outs to a repair order,returns to inventory when a repair order closed out, etc.);**

Infor Response:

Infor EAM can be integrated with wvOASIS to synchronize data using built-in integration tools.

- **Two-way interface with Fuel Master application for fuel usage; and**

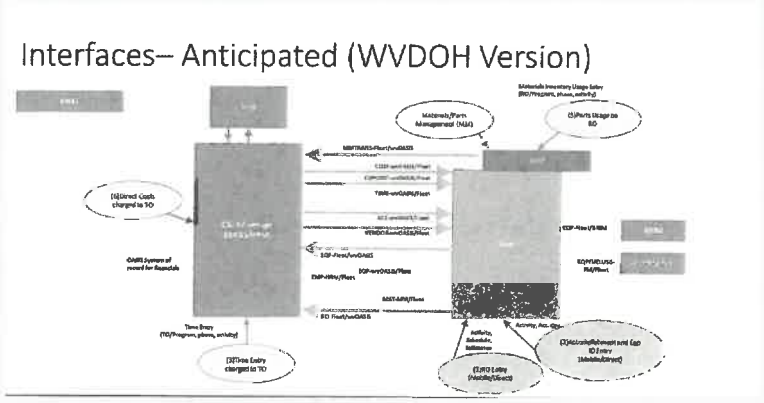
Infor Response:

Infor EAM can be integrated with Fuel Master to synchronize data using built-in integration tools.

- **Two-way interface with DOA Fleet Management Office for leased passenger equipment.**

Exhibit 2 below depicts the envisioned integration between the new Fleet and Equipment Managementsystem and the rest of the wvOASIS ERP environment.

EXHIBIT 2: PROPOSED TO-BE INTEGRATION ARCHITECTURE FOR NEW WVDOT FLEET MANAGEMENT SYSTEM



WVDOT Anticipated Interfaces

Infor Response:

Infor EAM can be integrated with DOA Fleet Management Office to synchronize data using built-in integration tools.

4.2.2.3.6 Modeling and Analytics

The VPS shall:

- **Capture asset-related costs throughout the entire life cycle of the fleet and equipment asset fromcommissioning through disposal;**

Infor Response:

Infor EAM maintains history of all costs arising from work orders, repairs, purchases, materials, resources, labor, third party costs, maintenance, projects, and other aspects associated with assets throughout their lifecycle from procurement and commissioning to disposition and removal. Cost history is maintained on assets even as they are transferred to other areas, locations, organizations, and other jurisdictions.

- **Allocate costs to individual assets and aggregate costs for various asset groupings, including models,types, classes, and subclasses; and**

Infor Response:

Costs can be aggregated, grouped, classed, and rolled up throughout the WVDOT asset hierarchy.

- **Provide for the use of alternatives identification procedures, level-of-service criteria, maintenance costminimization, and multi-period optimization within the modeling and analytics functions.**

Infor Response:

Infor EAM Asset Performance Management (APM) framework allows WVDOT to analyze the performance of its assets throughout the asset lifecycle. Deterioration curves, risk matrices, criticality, level of service, condition, and performance measures can all be captured on assets within Infor EAM to determine remaining service life before asset replacement/decommissioning. APM in Infor EAM is a framework that helps WVDOT make use of their physical assets to realize business-specific goals. Different strategies are employed under asset performance management to maximize profits and reduce business risk factors. The key elements of APM include:

- Providing a defined level of service and monitoring performance
- Managing the impact of growth through demand management and capacity planning
- Taking a lifecycle approach to developing cost-effective management strategies for the long-term that meet defined levels of service
- Identifying, assessing, and appropriately controlling risks
- Having a long-term financial plan which identifies required expenditures and their funding

In Infor EAM, the following steps are performed in achieving Asset Performance Management:

- Develop the asset registry
    - Infor EAM features comprehensive asset registry capabilities on the Assets, Positions, and Systems screens. Equipment Code, Description, Class, Commission Dates, Replacement Value, Service Life, and End of Useful Life are just a few of the fields configurable by WVDOT captured within the asset registry. Additionally, selection of a performance formula and recording replacement value with refurbishment options are available.
- Determine the asset residual life
    - The asset residual life is defined as the remaining service life (in years) before decommissioning the asset. Infor EAM identifies it as the moment the condition score reaches the threshold where it becomes unsatisfactory. Remaining service life is dependent of the current asset condition, and predictions of the future decay, due to expected operational use. Infor EAM has functions to continuously calculate current condition score and predict remaining service life including decay curves and equipment ranking screens.
- Determine the business risk
    - With the Reliability Centered Maintenance (RCM) functions available with Infor EAM, WVDOT can define risks, criticality, and events that may cause failure to achieve objectives with associated consequences.
- Set the target level of service
    - Level of service is a key business driver and influences all Asset Performance Management decisions relating to the quality, reliability, responsiveness, sustainability, timeliness, accessibility, and cost considerations. In Infor EAM, in accordance with ISO 55001, WVDOT can define policies, strategies, and objectives. To judge whether objectives, strategies. or policies have reached their desired goals a little easier, records on the Objectives, Strategies, and Policies screens can all be associated to a ranking survey defined on the Equipment Rankings screen. The survey questions can be answered manually or automatically making this an easy and consistent process.
- Assess asset performance
    - Asset performance is a concept that can be applied to a set of like assets within the same class or category for visibility of a portfolio of all assets within Infor EAM. Asset performance

can be defined by WVDOT as a function of condition, operational capacity, reliability, and maintainability to include Asset Condition, Asset Operational Capacity, and Asset Reliability.

- Build the APM plan
  - Considering the defined service levels and the continuous decay of assets within Infor EAM, WVDOT will at some point experience that one or more of these assets no longer meets the requirements and they must either be replaced or be refurbished to bring the asset back to an acceptable service level. Workflows, approvals, fields, flex rules, reports, analysis, and other components can be configured by WVDOT to meet specific business processes in developing its APM plan.

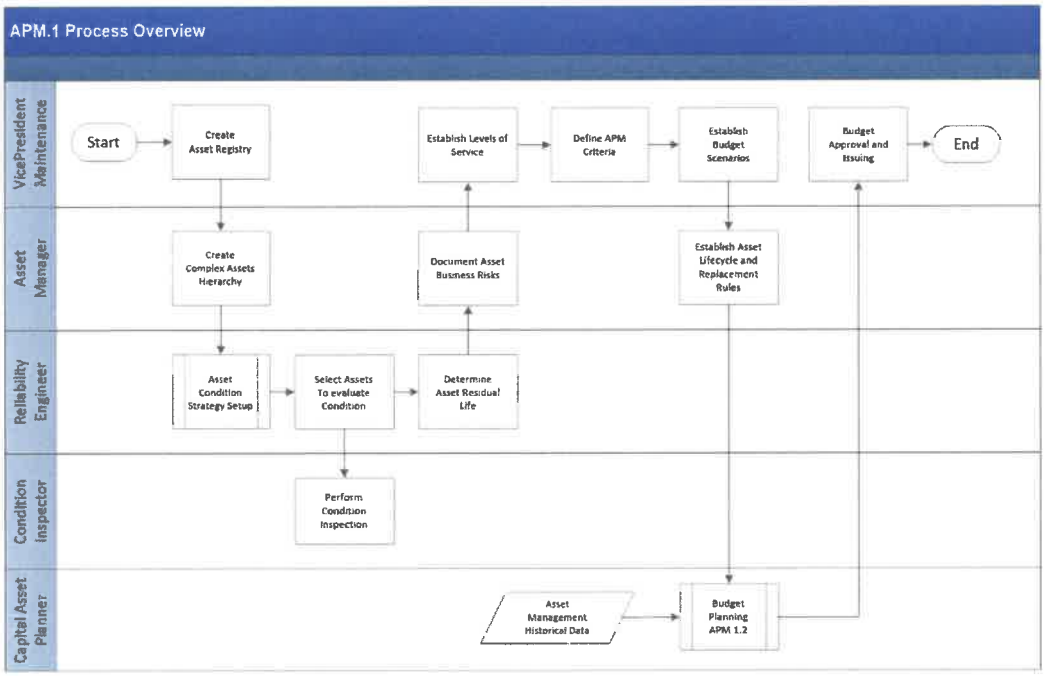


Figure 9.17 - Infor EAM Asset Performance Management Sample Process

4.2.2.3.7 Management and Reporting

The VPS shall provide a range of standard pre-defined reports that are available using role-based access,support integration with leading third-party reporting tools and incorporate an ad-hoc query capability within the proposed software solution.

Infor Response:

Infor EAM has many different reporting tools available to its users depending on the type of report that is desired. The reporting capability is easy to use and intuitive. Infor EAM Advanced Reporting allows WVDOT to create and distribute ad-hoc, custom, and predefined reports with an easy-to-use, web-based, drag-and-drop user interface. There are over 200 standard reports within the application that provide a basic layout, summary, and analysis of the data within the system.

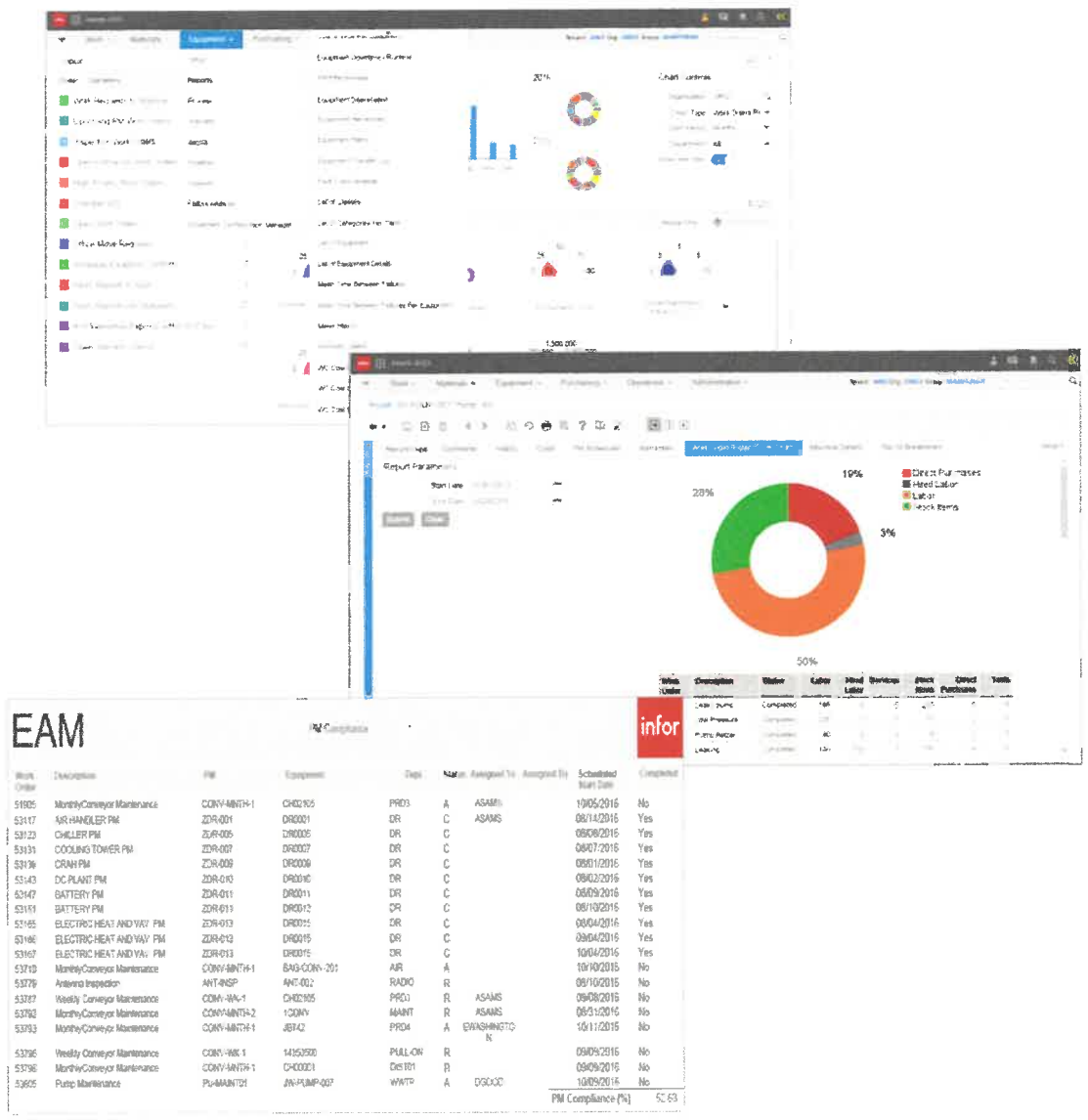


Figure 9.18 - Infor EAM Sample Reports

In addition to the over 200+ Standard Reports available in Infor EAM, ad hoc reporting needs can be addressed within the solution through the Infor EAM Advanced Reporting tools. As an extension of the standard reports, Infor EAM Advanced Reporting is a built-in reporting engine that will allow modification of the existing reports as well as create any number of additional WVDOT defined ad-hoc reports. These reports can be added to the menu structure and added into screen tabs as well as automatically run and emailed to various users on a distribution list. Standard reports and user-defined reports created with Advanced Reporting module can be saved in PDF, HTML and Excel formats.

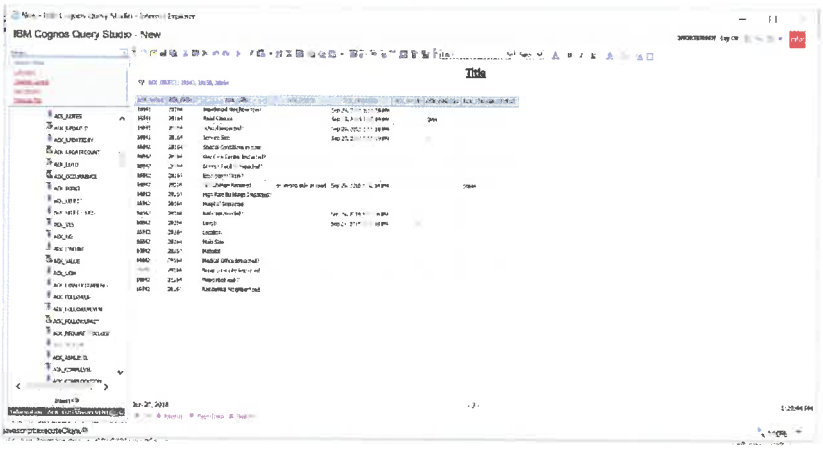


Figure 9.19 - Infor EAM Ad Hoc Reporting

Dataspies, intuitive savable reusable queries, are used within Infor EAM to extract data and view the information. Dataspies can be developed with multiple filter criteria and sorts, and a user-defined layout of data fields. Dataspies can be global or specific to the user. The user can determine which Dataspy is the default list view, while easily switching Dataspies. Additional filters can be added to further filter the Dataspy results. User-defined grids/lists with the ability to join data from multiple tables can be easily created and queried with Dataspies. All list views can be exported to MS Excel.

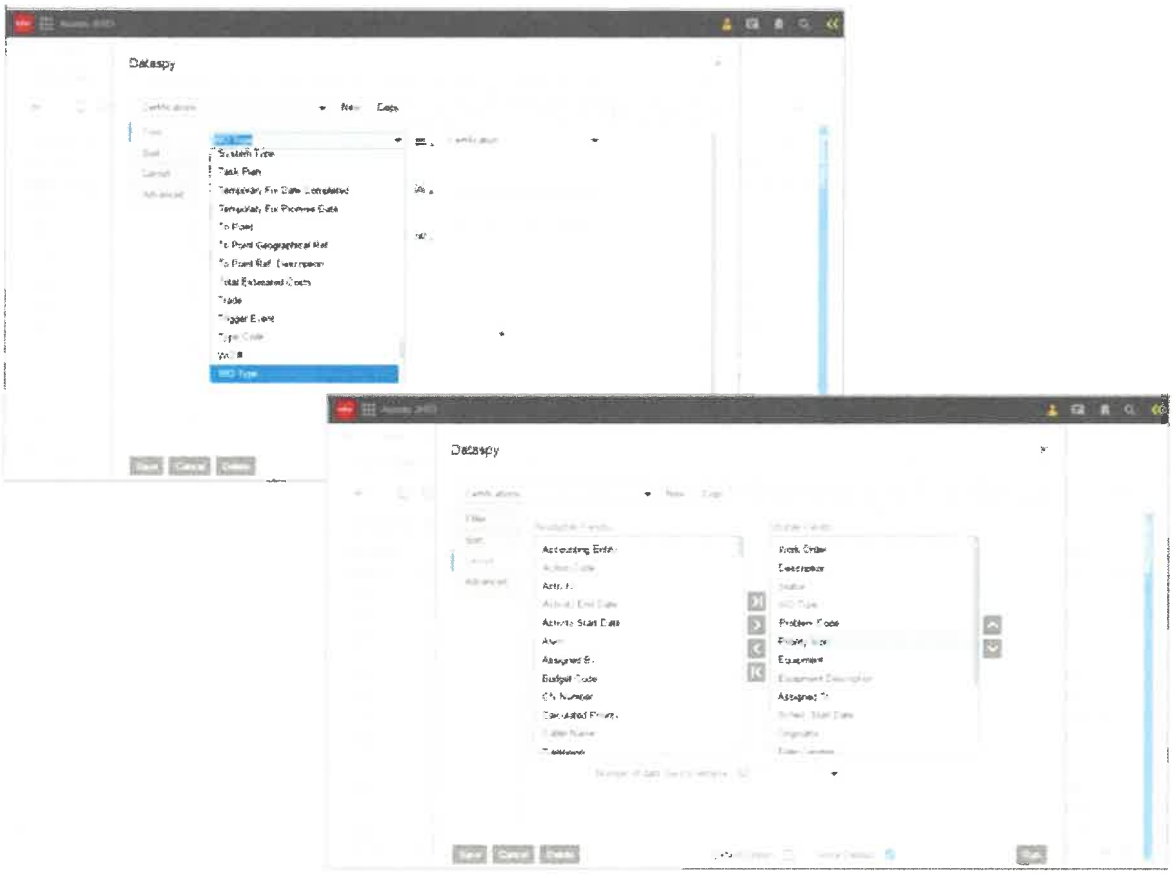


Figure 9.20 - Infor EAM Dataspy Query

A user-configurable Dashboard with Inboxes, Charts and KPIs is provided as a Start Center in Infor EAM. The Dashboard consists of simple queries into the database and extracts the information in an easy to view format. Links to lists of summarized data can be added to the KPI's and Inbox items. Start Center provides the WVDOT user with the capabilities to drill down into the corresponding records representing the values displayed. There can be an unlimited number of Inbox items, Charts and KPIs which can be user-group specific, based on what the WVDOT user needs to see.

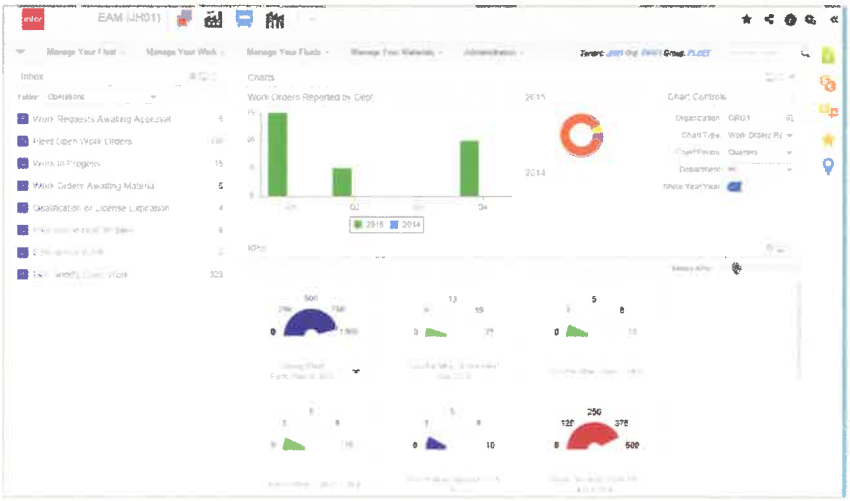


Figure 9.21 - Infor EAM Configurable User Defined Start Center

Additionally, for strategic analyses, Infor Birst is an optional add-on Business Intelligence (BI)/Analytics tool that allows WVDOT to dynamically mine a rich trove of data quickly enough to support important decisions. Infor Birst delivers pre-built data models, strategic KPIs, operational metrics, and a library of reports and analytic widgets, configured for the industry. As a modern BI and analytics platform, Infor Birst is uniquely positioned to provide end-to-end capabilities to align with WVDOT needs for Infor EAM analytics and reporting. Key differentiators include:

- Complete end-to-end analytic capabilities, including a wealth of source connectivity options, ETL, data modeling, data storage, reporting, self-service data visualization, interactive dashboards, and mobile analytics.
- The ability to integrate and organize multiple different data sources for reporting purposes
- Agile self-service BI for all user profiles, governed by a central source
- Multi-tenant cloud infrastructure which provides 99.7% uptime SLA, greatly minimizing the impact on IT Resources & ensuring a highly available analytic resource

Infor Birst is designed to deliver on the promise of advanced reporting for Infor EAM and any other WVDOT data source. Infor Birst can fulfill WVDOT requirements in providing a competitive advanced reporting, BI, and analytics solution for today while growing into the future.

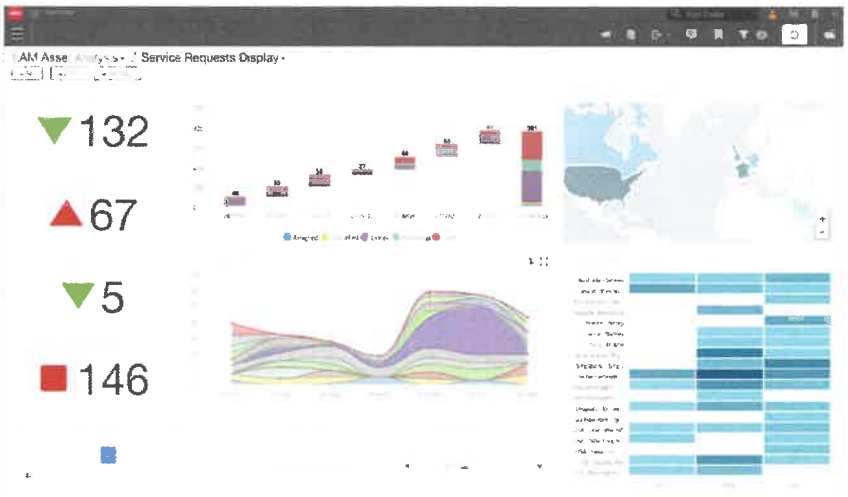


Figure 9.22 - Infor Birst Dashboard

Data within Infor EAM is available with appropriate access controls and security in place to allow WVDOT's existing BI analytics tools to perform additional analysis/reporting consistent with existing WVDOT practices. Data can be exported directly using the Dataspies and reports within Infor EAM to csv formats or accessed through the integration tools available with Infor EAM. Using Infor DataLake, multiple existing data sources can be incorporated and accessible in combination with Infor EAM information to expand the analysis capabilities for WVDOT providing a more robust detailed picture of operations.

Additionally, data can be visualized with graphs, charts, and more advanced analytics using the Infor EAM Advanced Reporting and Infor Birst analytics tools.

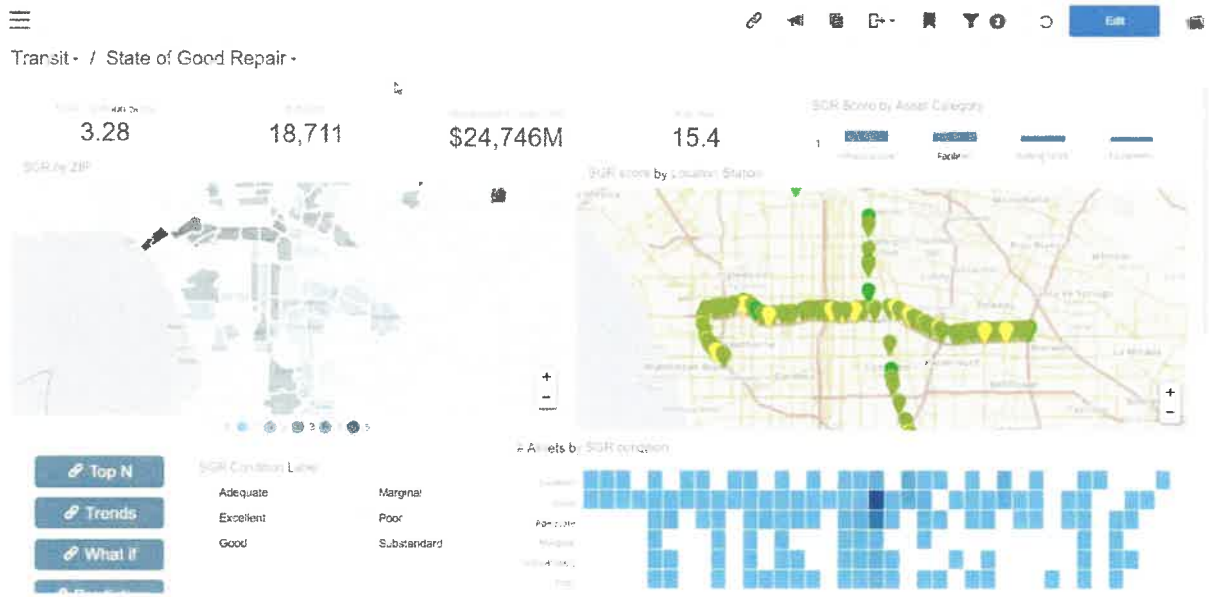


Figure 9.23 – Infor EAM Birst Data Visualizations

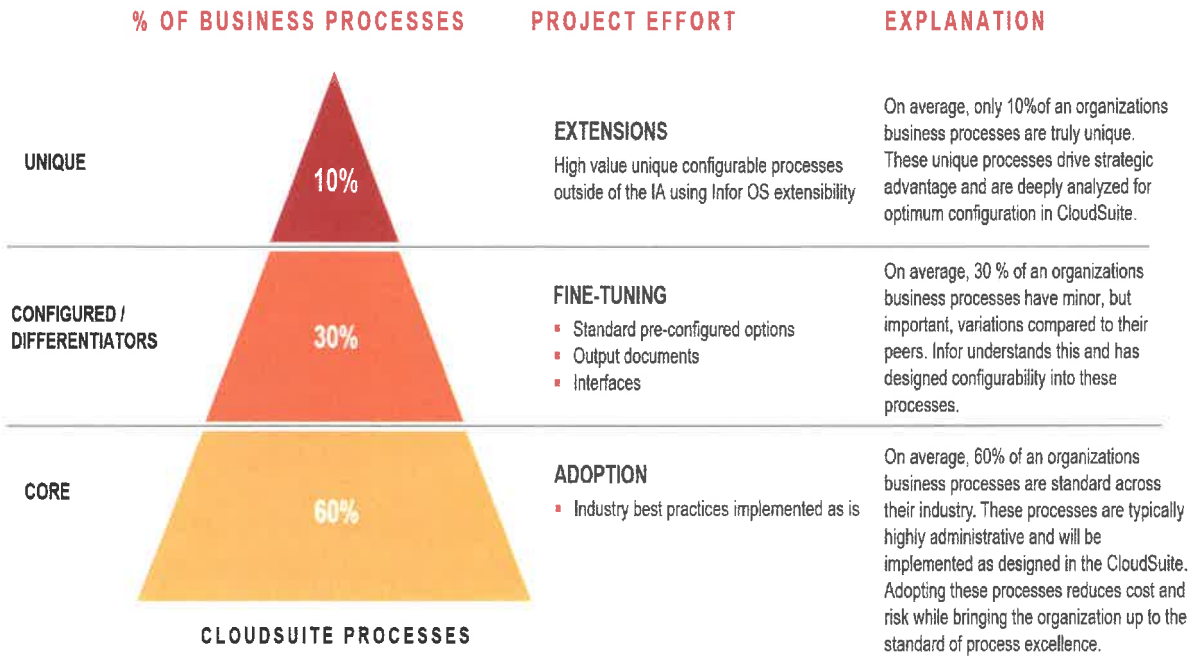


Figure 9.24 - Infor EAM Birst Data Visualizations

4.2.2.3. 8 Technical Specifications

WVDOT is open to proposals for deploying the new VPS using either an on-premise implementation in a State Data Center or in a Software as a Service (SaaS)/Cloud model in a Vendor hosted environment. TheVPS architecture and infrastructure shall be consistent providing a unified approach and user experience throughout the solution proposed.

Application Architecture

The VPS application architecture shall provide a consistent set of general system features and functions which occur across all business functions within the VPS application, These general system features andfunctions include a consistent user interface, workflow design and development capabilities, self-servicefunctionality, capability to integrate with document management solutions, capabilities to integrate with the WVDOT GIS environment, capability to integrate with computer aided dispatch and automated vehicle locating (AVL) technology, mobile technology capability, security, archiving, audit trails and online help functionality.

Infor Response:

Infor provides a fully hosted and fully managed SaaS solution that covers all technical aspects of the application deployment, including infrastructure monitoring, hardware sizing, operating system refreshes, capacity management, performance and load balancing, networking connectivity and security monitoring. Infor leverages Amazon Web Services (AWS) to provide the infrastructure in which the fully managed solution is hosted. Infor solutions include a set of system, application, database, and infrastructure installation and support services. These include application and hardware administration, patch management, database and operating system management, performance monitoring, backup and recovery, and proactive health checks.

Infor EAM is intuitive, web based, user friendly, easy to use, and arrives with modern, consumer-like user interface, replete with business collaboration features, mobile applications, and predefined (but configurable) KPI's and analytics. Infor EAM offers a web-based interface that is accessible from any web browser session on a WVDOT device. At a minimum Infor EAM supports Internet Explorer, Chrome, Edge as well as Safari for users on Mac operating systems. Infor EAM offers context sensitive help within the solution making it easy for WVDOT users to find the information required to perform their roles. WVDOT can also include user guides, documents, videos, and other necessary materials within the online help to assist in guiding its users.

Conversational User Experience Powered by Infor OS

A consumer-inspired user experience, plus voice and chat commands, make software more intuitive and easier to use. By marrying business processes to employee communications, Infor OS's collaboration capabilities allow WVDOT to contextualize intelligence, make single sign-on a reality, and increase efficiency by enabling employees to work smarter and faster. Key components available with the web-based capabilities of Infor OS include:

- One place to go for users – Infor Apps & Third-Party Apps
- SSO, User Management

- Embedded Analytics
- Common Menu
- Bookmarks
- AI Digital Assistant
- Enterprise Data Search Capabilities
- User Configurated Collaboration Tools
- Tasks
- Alerts
- Notifications
- Workflow Locator
- Chat / Activity Feed
- Mobile
- In-Context Widgets

Infor EAM is designed to provide a very high level of flexibility and configurability. Configuration changes stay within the Infor EAM application and are not lost when WVDOT upgrades to a new release. Menus and screens can be redesigned and access to menus and screens tailored by user role/group. Infor EAM administrators can configure screens by changing label names, move fields, hide fields, develop user defined fields, etc... using the Screen Designer functionality. Administrators can also clone and modify screens or develop their own user-defined screens, with their own user-defined tables. User-defined tables can link to current screens to support specific business processes. Infor EAM also allows user-defined workflows, user-defined grids (list views), and Flex business rules. Flex business rules can add automatic updates to fields and calculated fields as records are created or data is changed. Additional enhancements can be added through Infor EAM Extensibility Framework.

The Infor EAM Extensibility Framework allows WVDOT to perform advanced configured actions on the existing screens and tabs delivered with the Infor product. Advanced configured actions include

changes made to fields on a screen or tab, or actions made by toolbar button access. This flexibility allows WVDOT to compute field values, verify input and to perform other tasks with external applications prior to the normal Infor EAM business flow. All changes made through Infor EAM configuration and the extensibility framework are saved in the database so that they are still available after software upgrades.

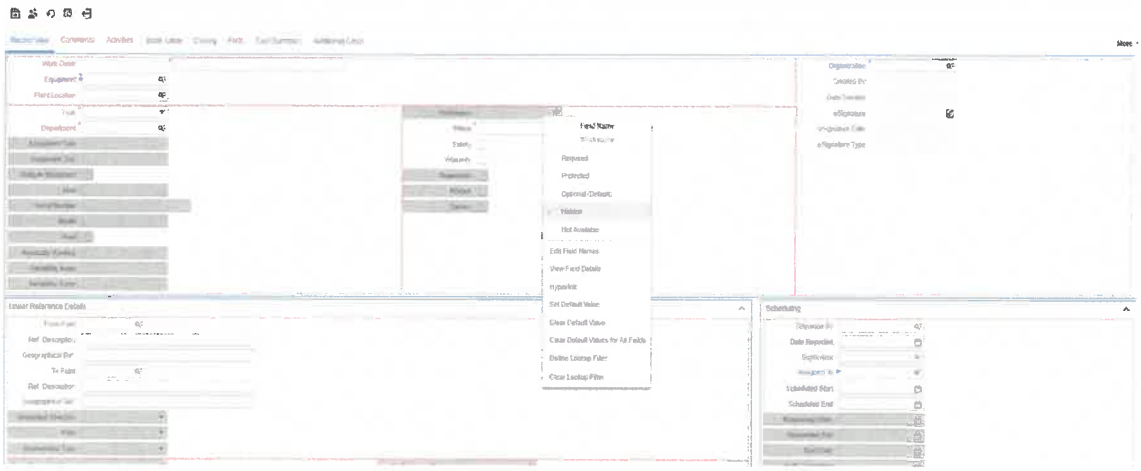


Figure 9.25 - Infor EAM Screen Designer

Infor EAM allows WVDOT to configure workflow against its asset activities that are milestone based, from service request intake to work order approval and completion in support of WVDOT business needs. With the flexibility and configurability of Infor EAM, the varying workflows, specific needs, and capabilities can all be addressed within the system. Access, groups, and roles can be configured within Infor EAM to control asset activity based on workflows. WVDOT users can monitor active workflows, attach documents, configure workflow templates, and track the progress of workflows.

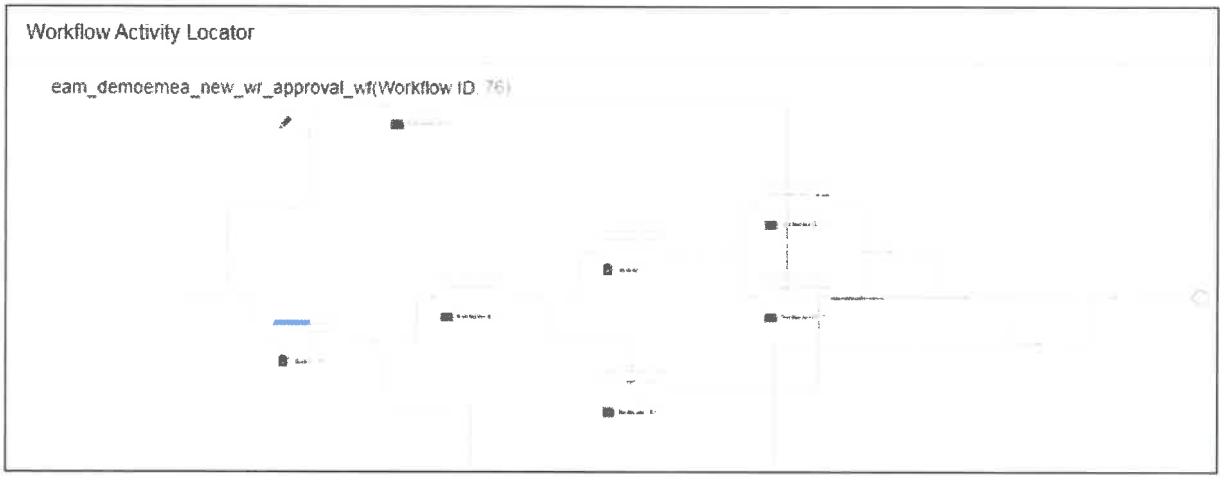


Figure 9.26 - Infor EAM Workflow

Infor Document Management (IDM) is an enterprise document management application deployed and integrated within Infor EAM. IDM is a central repository where WVDOT can maintain its common business rules for creating documents and view, edit, create, and store the physical files. With IDM, WVDOT can easily find required documents and ensure that the latest, most complete version is being used, alleviating the need for a separate document management application and minimizing risks of failed compliance audits.

Soft links are used, based on document metadata, to provide integration between documents and the Infor EAM solution. Users can view a document from within the context of the application or click a document link to retrieve the material from the central repository. Document Management supports

the entire lifecycle of business documents, from input through storage, retrieval, and sharing. Additionally, Infor EAM can incorporate links to documents shared on external storage sites including SharePoint. With IDM and Infor EAM, WVDOT will be able to ensure requirements for policy documentation will be met.

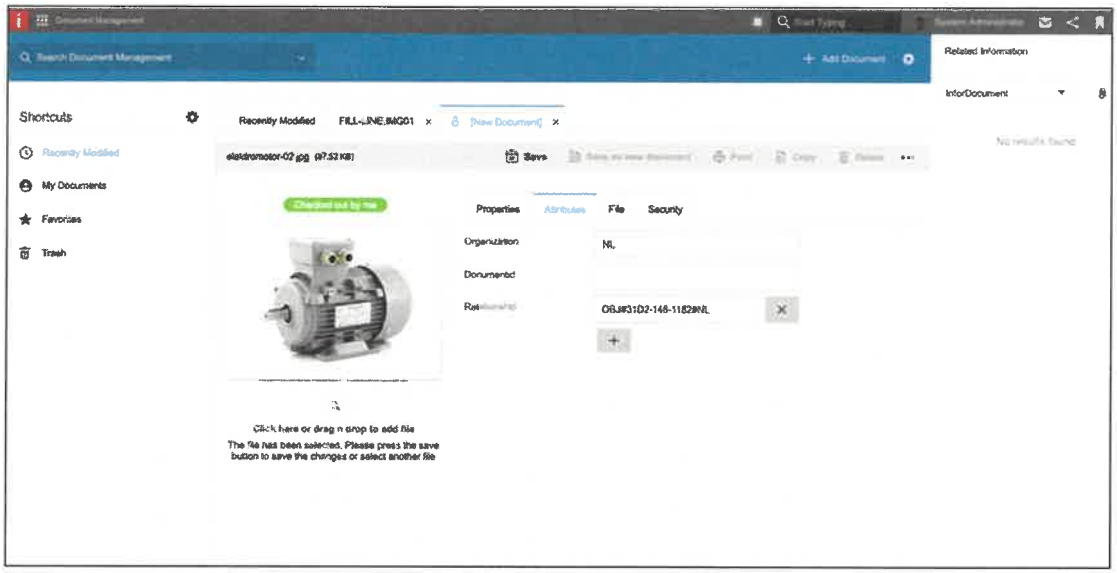


Figure 9.27 - Infor EAM Document Management

Infor EAM integrates to ESRI ArcIMS and the ArcGIS server platforms through REST Web Services. Both SDE connection and direct connection are supported for the Infor EAM to ESRI GIS integration. Infor EAM equipment records and GIS features are linked with a GIS object identification number (GIS ID in Infor EAM GISOBJID in ESRI). GIS stores no data other than a linking attribute and EAM stores no GIS data other than the same linking attribute so each can operate independently of the other. A plug-in is utilized to do the data mapping and using mobile will require one of the approved ESRI QA methods along with ESRI licenses for online mobile.

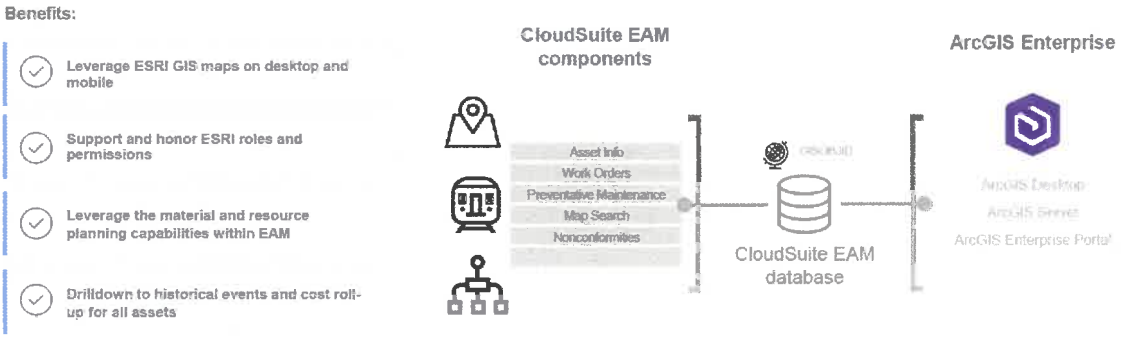


Figure 9.28 - Infor EAM/GIS Interface Architecture

With respect to integration, Infor provides a unique integration tool in Infor ION, included in Infor OS. The Infor ION Suite is at the heart of all Infor solutions, including the EAM solution being proposed to WVDOT. Infor Intelligent Open Network (ION) is a powerful integration platform that will enable WVDOT to integrate disparate solutions together using open-source standards. Infor ION has enabled the Infor EAM application to natively publish or subscribe to XML documents in our standards-based format. We call them business object documents (BODs). Infor ION connects and integrates Infor and non-Infor applications, storing information in a common format and repository. Infor ION allows information that flows among applications, analytics, and social media streams to be accessed by users from their desktops, laptops, and mobile devices. Unlike conventional middleware, the lightweight Infor ION technology is not layered on top of existing applications but infused into them. As a result, ION makes integrations quicker, simpler, and more reliable for software system administrators. The XML data structures our products support mean Infor can integrate to products on any platform and transform the XML to meet the public interface requirements of the targeted application. This methodology of loosely coupled solutions through platform independent structures like XML and Web Services will provide WVDOT with much greater functionality, scalability, and a lower cost of ownership.

Infor and many of our implementation partners can offer services to configure integrations with other legacy applications. Infor is uniquely qualified to provide these services as we are the owners and developers of the standard BODS provided to facilitate these integrations. Almost all Infor EAM clients have integrations in place. Examples include AVL, SCADA, ERPs, Financials, HR and many others.

WVDOT users can access the Infor EAM application through a standard Internet browser on any device from anywhere and at any time including Internet Explorer, Microsoft Edge, Google Chrome, and Safari. Infor EAM Mobile is a standalone mobile application that runs on iOS and Android. Infor EAM Mobile gives WVDOT maintenance technicians the tools they need to perform their work from a mobile device. This automates virtually every aspect of maintenance and data collection and allows users to create field-based work orders, use drill-down menus to retrieve detailed information about a piece of equipment and capture actual "wrench time" as work occurs.

Infor EAM Mobile—Enable workers to harness Infor EAM's functionality on a powerful mobile platform. Access, capture, and manage information directly from the job site or service location. This results in higher productivity and more effective decision-making. Infor EAM Mobile is licensed by device to support shared devices within a facility or crew.

• **Includes**: Work orders, work requests, meter readings, equipment, checklists, physical inventory, reports, case management, asset hierarchy, equipment inspections

Infor EAM Advanced Mobile—Take advantage of Infor EAM's most powerful, mobile-based EAM product. Extend user capabilities to more EAM modules and functionality. Infor EAM Advanced Mobile combines Infor EAM Mobile and Infor EAM Mobile Requestor, and is available via the Infor EAM Digital Work mobile app.

• **Includes**: Capability, work orders, work requests, permit to work, equipment, physical inventory, notebook, operator checklist, parts, purchase order receipts, asset inventory, requestions

Infor EAM Mobile Requestor—Allow users to create work requests, parts requisitions, and reservation requests, as well as provide access to the Contractor Portal. The Mobile Requestor is ideal for users that have a need to periodically create requests, or for contractors to see work that's been assigned to them. Users can now access the Mobile Requestor functionalities from Infor EAM's Digital Work platform.

• **Includes**: Work requests, parts requisitions, reservation requests, operator checklist, Contractor Portal

Rapid request—Use a quick and simple method to submit call center requests to Infor EAM from mobile devices. Upload pictures and specify locations with requests to identify work to be done. Eliminate the need for users to log in for one-off requests.

• **Examples**: Equipment repair, facility maintenance requests

Figure 9.29 – Infor EAM Mobile Capabilities

Infor EAM has all the tools WVDOT administrators might need to control and monitor access to sensitive data, to include audit trails on all tables, the ability to create triggers through an administrator GUI, the ability to create custom screens and tables, the ability to create custom list views, the ability to control screen access by user group, and the ability to report on any data. Using these tools, an administrator can control and monitor all user activity to conform to any standard. Infor EAM Audit Trails provide a flexible way to track changes to data, comments, and attributes for almost every Infor EAM table. Data is validated against look-up values for most results. Errors are trapped as they occur. Infor EAM records usage, screens accessed, user logins, and times of access. Infor has implemented a centralized Security Information and Event Management (SIEM) solution which copies all logs to an immutable location for analysis and reporting. The level of logs includes access to systems and database and records of the activities that were performed. Application-level logs are available if the logging feature is enabled. The SIEM solution supports the needs for auditing and accountability. Alerting is provided by Infor's monitoring solutions, which provide extensive monitoring of all system activities.

Infor EAM is a completely scalable solution able to expand to meet all WVDOT data needs thereby eliminating the need to purge data from the system. WVDOT can, however, choose to archive data within Infor EAM if desired to meet specific reporting, regulatory, retention, and analysis needs.

Technical Architecture

The VPS technical architecture shall provide tools to allow for enterprise application integration and dataintegration with other State of West Virginia systems including extract, transform and load (ETL) tools and/or the capability to use third party tools for this purpose, The VPS shall also provide various systemmanagement tools or integrate with appropriate third party tools necessary to manage the operation of theVPS solution, The VPS shall provide for highly reliability and provide system performance and support for business continuity consistent with the performance standards in Attachment 1. The system design ofthe core VPS software and any customizations shall be implemented so as to provide for long-term supportability.

Infor Response:

The Infor Cloud built on Amazon Web Services (AWS) offers you the best available cloud infrastructure, network services, and application designs—so you get the reliability, security, and scalability you need to trust your business to cloud-based software. Infor's innovative cloud technologies, built to work hand in hand with the world class capabilities of Amazon Web Services, can give your organization the power and responsiveness you need to stay ahead in a business environment that's more fiercely competitive than ever.

• Rapid scalability—Infor CloudSuite solutions can easily adjust to changes in processing volume as your business demands fluctuate, because of the way Amazon Elastic Load Balancing automatically adjusts to cover shifting capacity requirements. That's especially important in businesses that need to respond to highly variable levels of demand, such as seasonal sales or annual events.

• High availability—All the Infor products can be spread across multiple AWS Availability Zones (AZs) to optimize fault tolerance and reduce any risk of downtime. We've built everything to minimize single points of failure, so whether you're a global manufacturer that runs 24X7, or a hospital provider, you won't have to worry about downtime.

• Great elasticity—Infor can now deploy mission-critical enterprise applications with a wide variety of server configurations and varying utilization, thanks to the exceptional flexibility of the Amazon Elastic Compute Cloud (Amazon EC2). Because Amazon EC2 readily replaces vast amounts of physical server hardware that you would otherwise have to purchase and deploy, you gain unmatched reliability and availability at no additional cost.

• Quick disaster recovery—Infor CloudSuite solutions help ensure business continuity in the face of the most challenging disaster recovery scenarios. Our solutions can be distributed globally across AWS data centers, plus, AWS offers sophisticated global failover capabilities. Combine the two, and you get rapid redeployment of both applications and data in response to nearly any imaginable service disruption around the globe.

AWS maintains data centers in geographically disperse data centers for redundancy. Infor will work with the customer to select AWS data centers that best fits their needs.

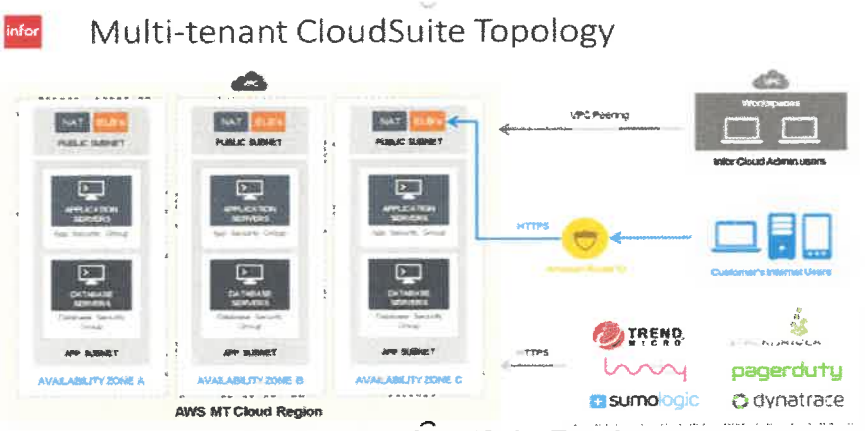


Figure 9.30 – CloudSuite Topology

Infor OS provides a modern foundation for driving transformation and progress in enterprises across every industry. Designed to serve as the foundation for your entire enterprise ecosystem, Infor OS provides seamless integration between your systems, a unified user experience across all your applications, and organization-wide visibility into the real-time information you need to drive your business.

Infor designed the platform is designed for you to use in your enterprise with on-premises, hybrid, or full Cloud environment infrastructures. The Infor OS API Gateway can tie into Infor and non-Infor systems to pull enterprise data together into a single or multiple Data Lakes. Infor OS has modules that can harness the power of your data, including PaaS analytics, application extensibility, AI/machine learning and IoT.

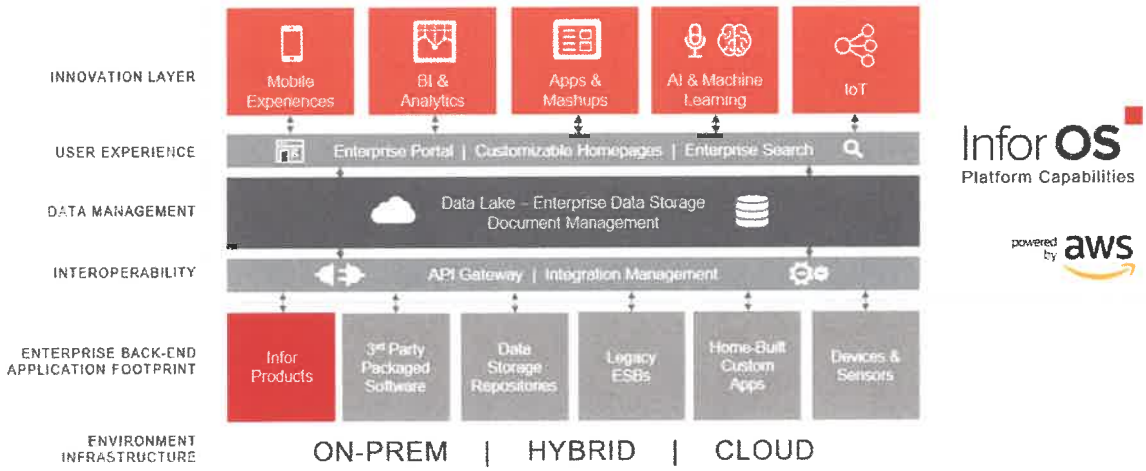


Figure 9.31 – Infor OS

Depending on thetechnical architecture being recommended, the Vendor shall include the additional information below:

<u>On-Premise Model</u> - Technical specifications for the development, testing, training, production, anddisaster recovery/reporting landscapes required to implement the VPS, with sufficient detail to allowWVDOT and WVOT to estimate the cost of implementation and operation of the environment.

Vendor should be prepared to support initial software configuration, development and testing in a Vendor hosted environment to allow sufficient time for the required environment to be established byWVDOT and WVOT. All project activities beginning not later than user acceptance testing shall occur in the State managed on-premise environment.

Infor Response:

Not applicable as Infor is proposing a SaaS solution.

The Infor Cloud provides customers a fully managed, Software-as-a-Service (SaaS) solution, including a comprehensive set of system, application, database and infrastructure installation and support services. These services provide full administrative coverage, patch and update management, database tuning and performance management, backup and DR capabilities, and a comprehensive set of proactive monitoring and health checks. Infor's Cloud solutions leverage Amazon Web Services (AWS) to provide the physical facilities, network infrastructure and core services upon which our applications are delivered.

No onsite installation besides a recent supported browser is required.

<u>SaaS or Cloud Model</u> - Detailed discussion of the technical environment in which the VPS will operate including information on the data centers which will host the development/testing/training, production, and disaster recovery environments. The production and disaster recovery environmentsshall be hosted in data centers which are geographically distant from each other.

Infor Response:

Yes, Infor leverages the services of Amazon Web Services (AWS) to provide the infrastructure in which the fully managed solution is hosted. AWS maintains data centers in geographically disperse data centers for redundancy. The Backup data is replicated within the same region of provisioning on AWS (between Availability Zones).

Infor has partnered with Amazon Web Services (AWS) to provide data center hosting services. AWS provides multiple Availability Zones (AZ) in the same region, which are in essence separate data centers across various geographic regions. These multiple AZs support high-availability, fault tolerance, and seamless failover capabilities. Example: should AZ1 go down, AZ2 and AZ3 would pick up the load. At the same time, a new instance will be created to ensure that there are 3 AZs again.

10-Sample Statement of Work

The Sample Statement of Work is included immediately following this page.

Infor Consulting Services Work Order

Infor EAM Fleet Maintenance

Submitted by:
Helen Dawson, EAM Client Partner
Phone: (813) 334-3071
Email: helen.dawson@infor.com

Date:

Infor Statement of Confidentiality and Intent

The material contained in this Services Work Order represents proprietary and confidential information pertaining to Infor products and methods. By accepting this information, Client hereby agrees that the information in this Services Work Order shall not be disclosed outside of Client and shall not be duplicated, used, or disclosed for any purpose other than to evaluate this Services Work Order.

The consulting services contained herein is separate from any Infor program licensing bid. In most cases, clients may acquire program licenses without acquiring Infor Consulting services and may acquire the program and consulting services referred to herein, once a bid is provided, separately at the fees stated in the respective proposal(s).

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Introduction

TIME AND MATERIALS

SERVICES WORK ORDER

INTRODUCTION

This **Time and Materials** Services Work Order ("Work Order or SOW") is subject to all terms and conditions of the Software Services Agreement between _____ ("Infor") and **The Client** ("Licensee") with an Effective Date of _____ (the "Services Agreement"). All terms of the Services Agreement are incorporated herein by this reference. Capitalized terms not defined in this Work Order are defined in the Services Agreement. In the event of a conflict, the terms of this Work Order control over the terms of the Services Agreement. Absent Infor's signature below, the offer specified in this Work Order expires if not executed by Licensee on or before "expiration date".

Effective date of this Work Order:	Upon Signature
Work Order Number:	OP-04195221
Prepared By:	Helen Dawson
Project Name:	Infor EAM Fleet Maintenance

Project Overview

Licensee intends to implement the Infor EAM products as listed in Section 1.1 Licensed Software Scope below for Garage and Fleet Maintenance. The project approach will leverage Infor's EAM Implementation Accelerator ("IA") which includes industry content and application tools to kick start and accelerate the implementation. The IA will make it possible for Licensee to implement Infor EAM in less time and without major modifications yet benefit from its flexibility and be able to execute continuous improvement over the long term.

Current operational efficiency is negatively impacted by a cumbersome paperwork order and parts usage process currently tied to the JD Edwards system (JDE). JDE is the legacy financial system in use by Client. It has shown that it is lacking when it comes to the needs of a modern, fast paced and high volume repair and maintenance facility servicing multiple brands of equipment.

Project Goals

- Implement and use VMRS (Vehicle Maintenance Reporting Standards) codes especially as it relates to maintenance and repair of trucks, trailers and light fleet. Use reporting to measure shop technician performance against industry standards. Track repetitive repairs and cost trends by system (Example – brakes, cooling system, etc.)
- Implement tighter controls and increase efficiency though system driven inventory (cycle counts) and bar coding for parts inventory.
- Easily identify and report on the length of time that individual trucks are out of service and for what reason. Reduce out of service time for vehicles.
- Report on the total expense and the nature of the expense, by vehicle, over the life of the vehicle and to lower our cost per mile
- To be even on transportation expense vs. revenue within two years to lower costs.

1.0 Project Scope

The scope of this engagement is based on information given to Infor by the Licensee and the key assumptions detailed in this Work Order.

The scope of the Infor EAM Fleet Maintenance implementation project for Licensee will address the items below:

- Improve, manage, track, and report on individualized maintenance schedules/checklists by vehicle and by manufacturer;
- Streamline processes and implement a tool to provide easily accessible, historical data to enable informed management decisions;
- Implement a parts management and inventory system that allows more accurate tracking, turnover reporting, kitting (assembling parts into a grouping for a specific maintenance activity), and barcode scanning for easier management at the Client's garage and at additional garages brought online; enable the ability to identify obsolete parts allowing their return to the supplier before they lose their value.
- Improve ability to predict maintenance needs and reduce unplanned vehicle out of service time. Calculate fleet utilization percentages;
- Be able to flag equipment and parts so that when future repairs are completed, we'll know that some potential warranty recovery exists; Generate warranty claims for work we have done in house and more accurately track "core charge" returns;
- Manage and schedule shop personnel, track productivity, and enable more efficient work order systems through integrated mobile devices; Scan parts to work orders for chargeback, provide easy access to vehicle history for technicians. Track technician workflows to look for potential process improvements.
- More fully understand and manage lifetime costs on our assets including our trucks, trailers, light fleet, and on garage tools such as torque wrenches and scissor lifts and plan for replacement of those assets based on historical performance.
- In addition, Licensee will learn how to extend robust asset maintenance management capabilities to other departments and divisions, such as manufacturing and facilities.

1.1 Licensed Software Included in the Project Scope

SKU	SKU Description
EEN-S-EUSE-XI	Infor EAM Enterprise Edition - SaaS – Xi
EEN-HOST-S-EWEBTK	Infor EAM Enterprise Edition Web Services Toolkit - SaaS
EEN-HOST-S-EWEBCL	Infor EAM Enterprise Edition Web Services Connector - SaaS
EEN-HOST-S-ECS	Infor EAM Enterprise Edition Advanced Reporting Consumer – SaaS
EEN-HOST-S-EAU	Infor EAM Enterprise Edition Advanced Reporting Author - SaaS
EEN-HOST-S-EFLT	Infor EAM Enterprise Edition Fleet Management - SaaS
EEN-HOST-S-EMOB	Infor EAM Enterprise Edition Mobile – SaaS

EEN-HOST-S-EBAR	Infor EAM Enterprise Edition Barcoding – SaaS
EEN-HOST-S-ECSR	Infor EAM Enterprise Edition Customer Service Request - SaaS
EEN-S-DS7I-RRQST	Infor EAM Rapid Request – SaaS
EEN-HOST-S-ALM	Infor EAM Alert Management – SaaS
EDU-S-EENM	Infor Campus Membership – EAM

License Software Scope Assumptions and Licensee Obligations

- Any software licenses required for this project will need to be licenses separately by the Licensee and are covered by a separate Software License Agreement. All Licensed Software is subject to the terms of the License Agreement and nothing herein shall serve to modify such terms or expand the scope of the license granted thereunder.
- Unless otherwise agreed to herein, Infor will install the production release version of the Licensed Software.
- Logging incidents with Infor Support is the responsibility of the Licensee.
- Unless otherwise noted, a single centralized environment/instance will be implemented for Licensee, using single common configuration and business processes.

1.2 Business Process Scope

The scope of this Work Order assumes a Cloud based (SaaS) implementation of Infor EAM leveraging the Implementation Accelerator (IA) approach.

The EAM Functional Scope table listed below defines the various modules of the Infor EAM software that will be configured to support the work defined above.

EAM Functional Scope	
Work Reports *All Applicable Reports* Processes Work Order Quick Close Generate Work Orders Release Individual PM WO Book Labor by Employee Work Order Planning PM Schedules Standard Work Orders Tasks & Check Lists Material Lists Routes Work Order Scheduling Work Requests Create Work Requests Review/Approve Work Requests Work Orders **Purchasing** Reports *All Applicable Reports*	**Equipment** Reports *All Applicable Reports* Processes Batch Meter Readings Warranty Claims Equipment Lists Assets Systems Locations **Administration** Reports *All Applicable Reports* Work Work Setup Employees Trades Shifts Supervisors Closing Codes

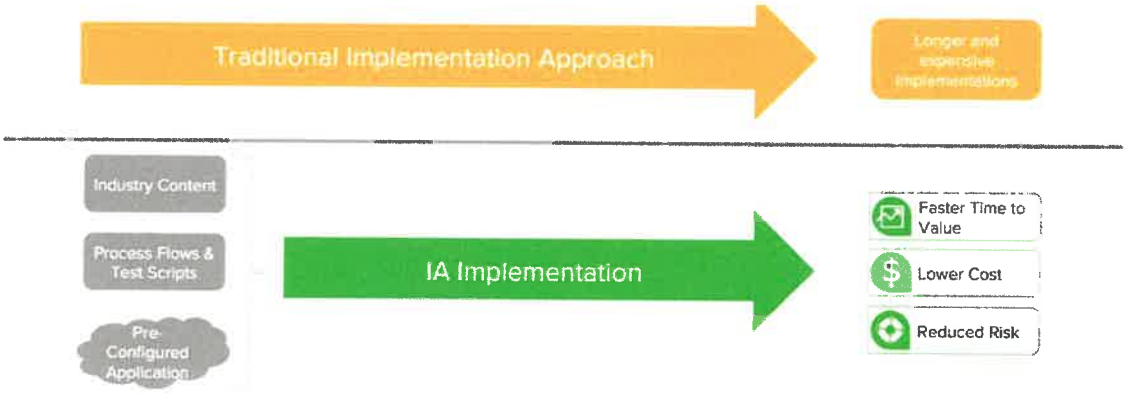
EAM Functional Scope	
Processes Generate Requisitions Generate Purchase Orders Receipt & Returns Purchase Orders Receipts Supplier Returns Requisitions Purchase Orders Blanket Orders Purchase Orders Revision history Purchasing Setup Purchase Order Terms Purchasing Clauses Reason for Return Tax Codes Tax Rates Tax Rate Types Delivery Addresses **Materials** Reports *All Applicable Reports* Processes Generate ABC Analysis Transactions Issue/Return Parts Pick Tickets Physical Inventories Non-Purchase Order Receipts Quick Store-to-store Transfer Inventory Parts Manufacturer Part Numbers Supplier Part Numbers Stores	Tools Qualifications Material Material Setup Suppliers Manufacturers Units of Measure Currencies Commodities Equipment Equipment Setup Meters Departments Categories Administration Setup Import Configuration Organizations Classes & Custom Fields Cost Codes Audit Setup Security Setup User Groups Users

IA approach

IAs are designed to deliver leading industry application processes in a cloud-based technology for our customers.

IAs provide an implementation solution that:

- Brings leading industry practices.
- Reduces total cost of ownership (TCO).
- Lowers project risks.
- Delivers a predictable outcome



Rather than undergo a time-consuming, traditional implementation—or reinvent the wheel to create content from scratch for your organization—you'll have access to best-practice content (End to End Business Processes, Pre-defined roles, and a Pre-configured instance) specific to your industry. By combining the industry business processes and our preconfigured database with our supporting content, Infor Implementation Accelerator solutions deliver proven results.

Implementation Accelerator Assumptions and Licensee Obligations:

- The IA will address the majority of requirements – additional effort to address any requirements beyond what is provided with the IA will be addressed through the change control process. Infor's approach will be to be prescriptive in our recommendation of using standard EAM IA functionality as part of the deployment.

Business Process Scope Assumptions and Customer Obligations

- Licensee has documented business process diagrams and user requirements as part of their Request For Proposal which will be reviewed by the project team prior to the workshops.

1.3 Organizational and Geographic Scope

As provided herein, the parties anticipate that Services will be performed for the following Licensee locations and/or business units ("Geographic Scope"). All Project activities will be conducted either remotely or at Licensee site.

Organizational and Geographic Scope Assumptions and Licensee Obligations

- Licensee will coordinate and support communication with all Licensee locations and/or business units as necessary for a successful implementation.

1.4 Data Migration and Conversion Scope

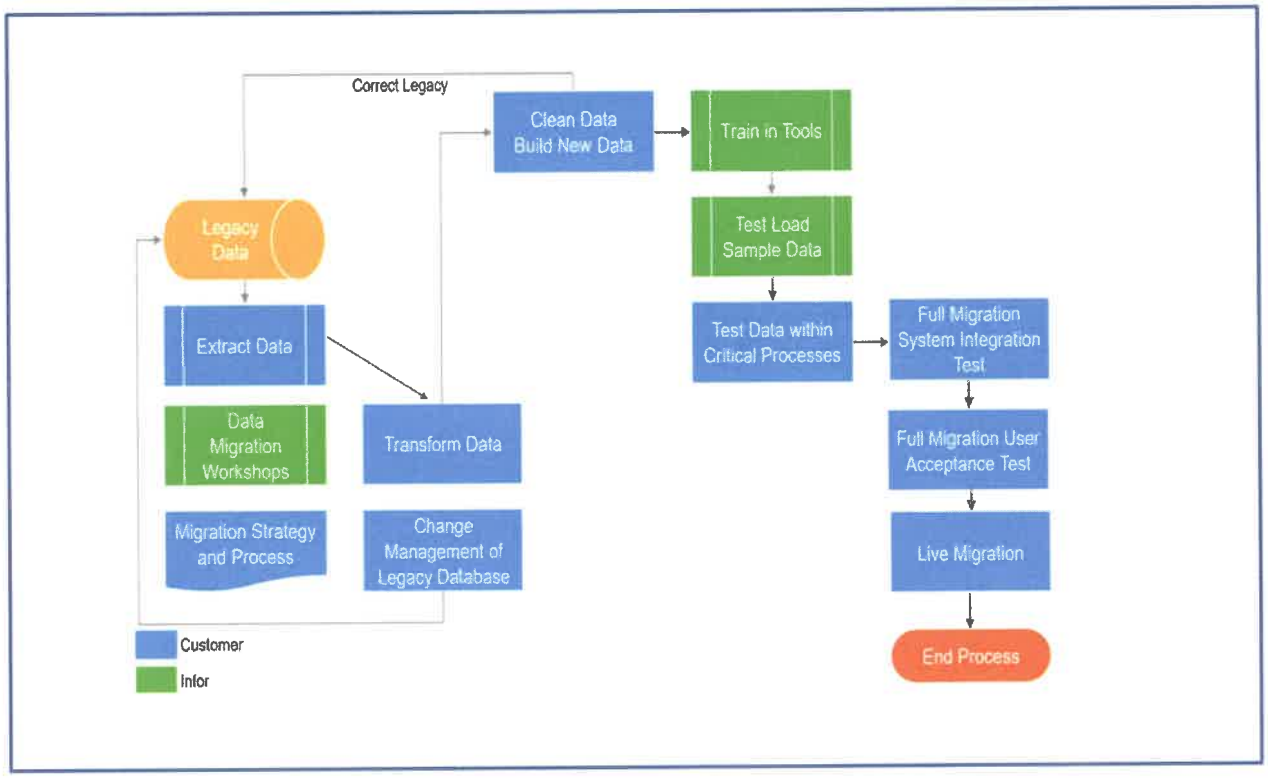
"Data Migration and Conversion" means the efforts associated with the analysis, cleansing, transformation/mapping, loading and reconciling of current or historical data from other systems into Infor systems, whether by manual or programmatic methods. The Data Migration and Conversion tasks identified below are within the Project scope.

The following tasks identified below are within the Project scope:

- Defining Key Data Structures
- Preparing for Data Conversions
    - Perform Data Mapping Workshop
    - Collect data from the Licensee
    - Load data into environment
    - Licensee validates and approves converted data

- Infor will conduct Data Mapping Workshops to help the Licensee understand data sets to consider loading and approaches to perform the load. Additionally, Infor will provide Data Load guidance to answer questions the Licensee may have.

Infor's Standard Data Conversion Process



Infor's recommendation is to load history (inactive / closed / completed items) into non-Live tables in order to ensure minimal schedule impact and minimized data cleansing activity by Licensee.

Infor will work with Licensee for the migration of relevant data from existing paper workorders, spreadsheets and JDE. It is understood that a majority of the processes today are not automated and data migration efforts are expected to be minimal.

Data Migration and Conversion Assumptions and Licensee Obligations.

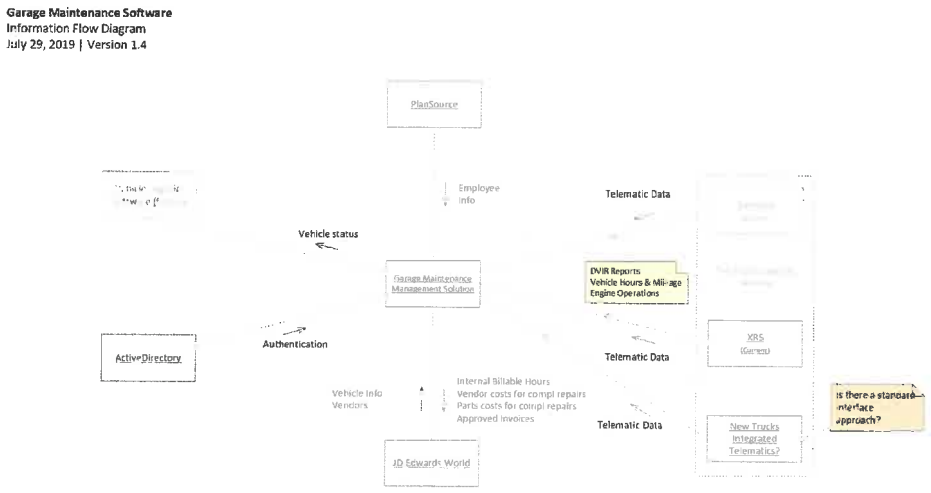
- Infor and Licensee will mutually agree to the Data Migration schedule. Infor will provide Licensee advanced notification of expected due dates/deadlines.
- Where the conversion method is manual, Licensee is responsible for performing the data preparation and data entry.
- Infor will conduct data migration workshops which validates conversion scope and introduces Licensee to the various standard approaches used to convert data into an Infor database.
- Infor will develop, manage and execute a plan (subject to review and approval by Licensee) for the conversion work that will meet the milestones of the Project plan.
- Licensee is responsible for all conversion activities, other than those identified as Infor responsibilities herein, and this includes but is not limited to the following:

- Extracting and cleansing legacy data, and transforming/mapping into prescribed formats provided by Infor.
- Designing and building any conversion programs that may be required.
- Converting data into the Infor system.
- Reconciling and validating converted data, and correcting and reloading data with errors.

1.5 Interface/Integration Scope

"Interfaces" means those objects that allow data to move either into or out of the installed applications, either in batch, real-time or near-real time. Interfaces are defined by the business processes they facilitate, the points during those processes where data is exchanged, the frequency in which data is exchanged, and the method by which the data is exchanged.

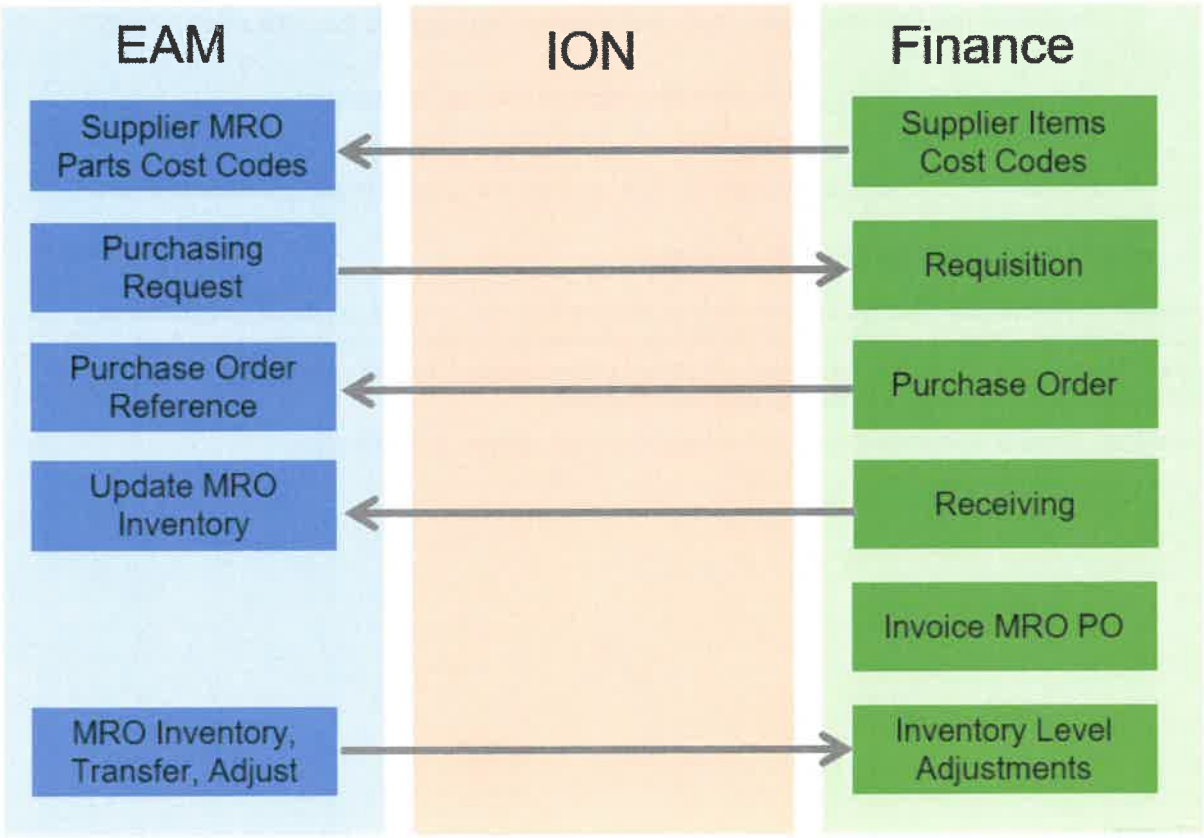
The diagram below is a high level view of the integrations envisioned for the project.



Interfaces in scope for this Services Work Order include the following:

- JD Edwards
- XRS
- Active Directory

The integration transaction flow between Infor EAM and JD Edwards will be finalized during the integration design workshop but it is anticipated to be similar to the diagram below:



Interface Assumptions and Licensee Obligations

- All data files for outbound and inbound interfaces with Infor applications will be in the specified Infor standard file formats.
- Licensee will provide access to any environment, data, and systems to test interfaces for all Licensee and third party systems to which the Infor applications will be interfaced with.
- The Licensee will be responsible for building the source system side of the interface, as required.
- Licensee is responsible for data validation efforts associated with interface testing, ensuring interfaced data, including any transformation, mapping or aggregating logic, is performing correctly.

1.6 Reports Scope

This section covers Reports and KPI development related to the implementation.

As an extension of the standard reports, Infor EAM Advanced Reporting module is a built-in reporting engine that will allow modification of the existing reports as well as create any number of additional d ad-hoc reports. These reports can be added to the menu structure and added into screen tabs as well as automatically run and emailed to various users on a distribution list. Standard reports and user-defined reports created with Advanced Reporting module can be saved in PDF, HTML and Excel formats.

Report and KPI development is scoped by complexity meaning the assumed complexity of the task as of the Work Order Date and is generally based on the highest category (Low to High) in which one of the assumptions of such category below applies:

Low: Changes are cosmetic or involve minimal enhancements to presentation or business logic. Functional requirements are simple and easy to understand. Downstream processes are not impacted. Very few objects are customized.

Medium: Changes to or additions of complex business logic are involved. Functional requirements are fairly complicated and will require periodic clarification. Downstream processes may be affected and need to be tested in conjunction with the configuration. Multiple objects are customized.

High: The configuration involves multiple interrelated business processes and complex logic. Functional requirements are very complicated and will require clarification and refinement throughout the development process. Standard Infor object modifications are intrusive. A substantial number of objects are customized or created.

Reports and KPIs Scope Assumptions and Licensee Obligations

- Licensee has documented reporting and KPI requirements as part of their Request For Proposal which will be reviewed by the project team prior to the workshops.
- Infor will provide a pool of one hundred sixty (160) hours of technical development for KPIs, Inboxes, Flex and Reports.
- Estimating for Reports, KPI, Inbox and FlexSQL using EAM Advanced Reporting development is based on the following:

KPIs
  - Simple complexity – 8 hrs.
  - Medium complexity – 20 hrs.
  - Complex – 32 hrs.

Inbox
  - Simple complexity – 4 hrs.
  - Medium complexity – 8 hrs.
  - Complex – 16 hrs.

Flex
  - Simple complexity – 8 hrs.
  - Medium complexity – 20 hrs.
  - Complex – 32 hrs.

Advance Report
  - Simple complexity – 16 hrs.
  - Medium complexity - 32 hrs.
  - Complex – 48 hrs.

- Report development scope and deliverables will be mutually agreed upon.
- The Infor EAM product contain standard reports which will be reviewed for usage by Licensee prior to developing custom reports.
- Report design and development activities assigned to Infor after utilization of the above referenced "Bucket of hours" shall require a change order process and be mutually agreed upon.

1.7 Project Team Readiness & Training Scope

"Project Team Readiness & Training Scope" means the efforts related to preparing Project team members with the skills and competencies required for their roles on the Project and to sustain the solution/system post go-live. Project Team Training within the Project scope includes:

- Private (onsite) Project Team Training performed by the assigned ICS EAM team members
- Project Team Training and Knowledge Transfer sessions to be conducted on: EAM Foundations, EAM System Planning, Reporting & KPIs, Data Uploading and Alert Management.

Project Team Training Assumptions and Licensee Obligations

- For private, Licensee-site training, Licensee will provide training accommodations and facilities including a computer work station for every attendee, a computer workstation for the instructor, internet access on all workstations to access Infor training environment (when applicable) and/or the Licensee environment (when applicable), printer access from each workstation, white board and flip-chart with markers, and a computer projector.
- Private Training Workshops may not include materials or training environment.

1.8 Go-Live Scope

Go-Live support is the work required to complete the cutover, Go-Live and post Go-Live tasks for the period of time described below. "Go-Live" is defined as the first time Licensee uses the Licensed Software to process data in Licensee's live production environment.

Activity	Key Assumptions
EAM Go-Live Support	*Infor will provide support for the Go-Live of EAM using a pool of forty (40) hours.*

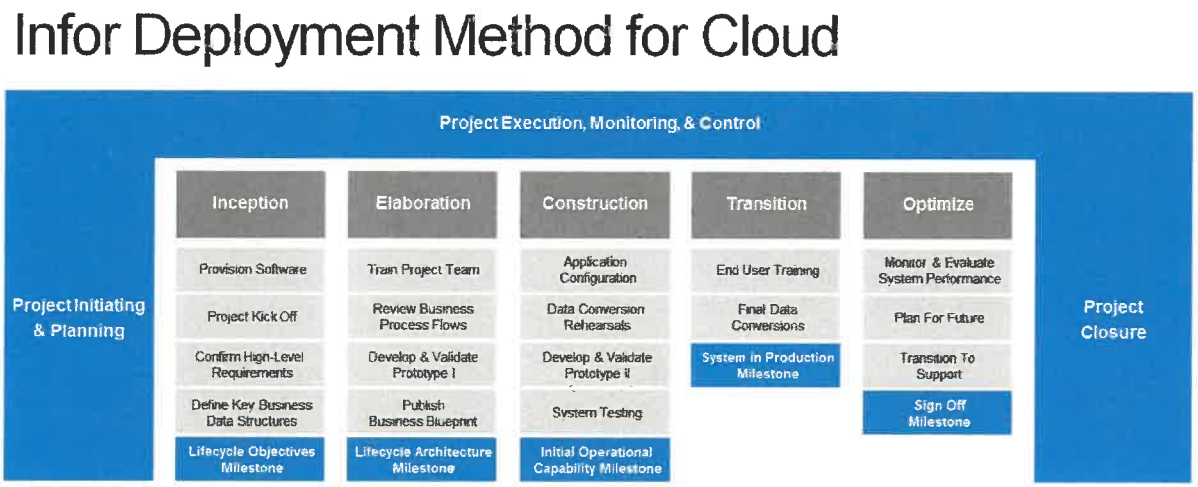
Go-Live Support Assumptions and Licensee Obligations

- If the Licensee is not ready to Go-Live upon completion of the Services described in this SOW, additional Services and training may be required ("Additional Work").
- The Infor Project Manager will work together with the Licensee Project Manager to develop a joint post Go-Live support resource plan.
- Licensee process owners and key users will provide first line support to Licensee end users.
- Infor consultants will support the Licensee process owners and key users with resolution of process questions and provide Infor application assistance where required subject to the Go-Live consulting hours above.

2.0 Project Approach

2.1 Implementation Approach – Infor Deployment Method

Infor Deployment Method will be used as the overall governing methodology for all Project related work for the Licensee Project activities associated with implementing the scope described herein. It defines what is to be delivered during the Project, which party is responsible for that work, and how the work is to be performed.



Designed specifically for Infor CloudSuite solutions.
Provides flexibility to expand tasks for more complex cloud projects.

2.2 Project Governance

The following governance processes and assumptions shall apply for this Project:

- Project Management Plan.
- Project Sponsorship and Executive Involvement.
- Monthly Steering Committee Reports and Meetings.
- Weekly Status Reports and Meetings.
- Project Issue Escalations.
- Project Change Control Process.

Project Change Control Process: Deviations that arise during the proposed Project will be managed using the Project Change Control Process outlined below. Changes could include, but are not limited to, changes in costs, timing, scope, or deliverables.

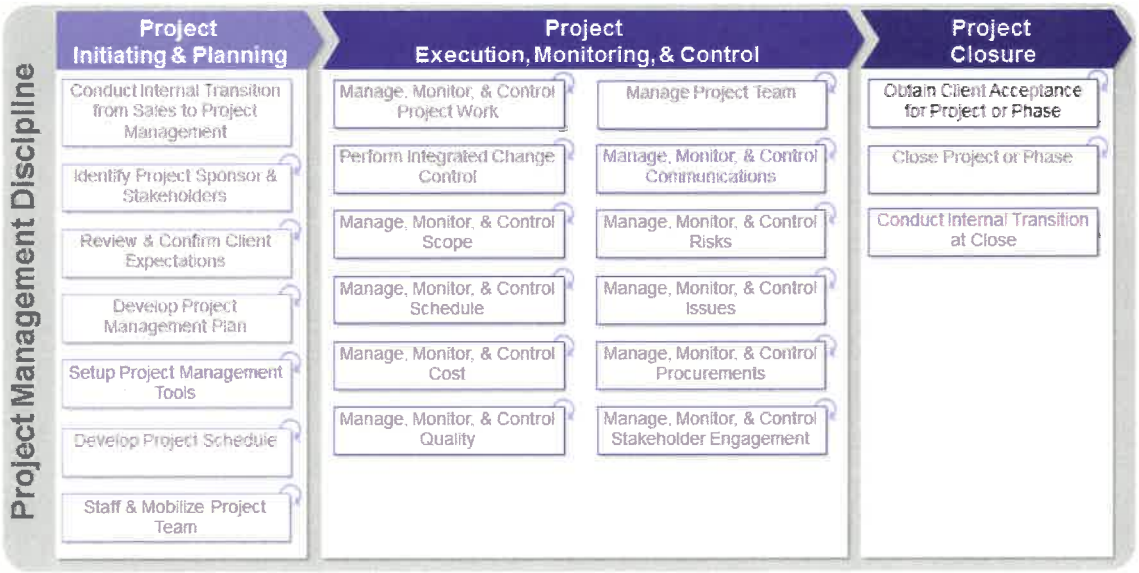
The Change Control Process will be invoked before any unplanned or out of scope work is executed or any work is completed outside Licensee's regular business hours. Any additional effort/costs as a result of such work would be subject to the following Change Control Process.

If either party believes that a change to this Work Order is necessary, such party shall issue to the other party a written change request ("Change Request"). In the case of a Licensee initiated Change Request, Infor will evaluate the feasibility of the Change Request as soon as practical following receipt and determine the impact to the Project cost and timelines. In instances where specialized resources are requested, but not contained, within the original Project scope, the quoted rate will be established at Infor's then current rate for such services. Infor shall provide Licensee a written statement (a "Change Response") describing in detail:

- Any additional Services to be performed as a result of the Change Request.
- The estimated cost associated with such additional Services.
- Any other information relating to the Change Request that may reasonably be requested by Licensee.

Licensee shall respond promptly to any Infor-initiated Change Request. If Licensee approves an Infor-initiated Change Request or a Change Response, with such approval to be in writing, such Change Request or Change Response shall be deemed to be a "Change Order." Any duly executed Change Order shall be attached to this Work Order.

The Infor Project Manager and the Licensee Project Manager shall be authorized to administer any Change Order. The estimated Project schedule shall be adjusted accordingly for each Change Order. If Licensee rejects an Infor-initiated Change Request, or any Change Response, Infor and Licensee shall proceed to fulfill their obligations as originally agreed under this Work Order.



Project Governance Assumptions and Licensee Obligations

- Infor and Licensee will manage the Project jointly, including work planning, activity and resource planning and budgetary control. All Project Management tasks will be delegated appropriately between the Infor and Licensee Project Managers during planning.
- Licensee will assign a full-time Project Manager. The Licensee Project Manager will be responsible for ensuring the performance of the Licensee Project team and for coordinating Project activities with the Infor Project Manager.
- Licensee Project Manager will coordinate all communication with Licensee personnel and provide a central communication channel for the Project with the Infor Project Manager.

2.3 Testing

Within Infor "Deployment Method," testing encapsulates a key set of test phases and associated activities that spans across multiple Infor deployment phases. The Deployment Method also includes a clear understanding of objectives and Infor versus Licensee roles and responsibilities. These testing requirements during each test phase are critical since each phase is the culmination and acceptance of many predecessor activities.

In addition to over-arching test planning, test-related activities for each test phase include the following:

- Test Planning
- Development of Test Scenarios/Scripts
- Execution of Test Scenarios/Scripts
- Documentation of Test Results
- Test Issue Resolution
- Test Phase Sign-off

The following outlines how testing will be approached for this Project, along with test-related roles and responsibilities:

- Unit Testing
- Integration Testing
- System Testing
- System Integration Testing
- User Acceptance Testing

Acceptance testing criteria will be jointly agreed by Infor and Licensee.

The following outlines how testing will be approached for this Project, along with test-related roles and responsibilities:

Unit Testing:

Description/Purpose: Unit testing validates individual units or components of custom code. Regardless of the system, units are generally considered to be the smallest parts of an application that can be tested for their functionality. Unit testing validates that the individual custom components are fit-for-use and function correctly to meet the relevant technical specifications.

For the purpose of Project roles and responsibilities, Unit Testing is assumed to be performed by the same individuals responsible for development, unless stated otherwise.

Integration Testing:

Description/Purpose: Integration Testing validates the integration of multiple units of custom code or components. Integration testing validates that when the individual custom components are combined, the interfaces between the individual units or components function correctly per the technical specifications.

For the purpose of Project roles and responsibilities, Integration Testing is assumed to be performed by the same individuals responsible for development, unless otherwise stated.

Integrated System Testing Scenario:

Description/Purpose: Integrated System Testing includes testing the business processes in a complete end-to-end manner.

Roles and Responsibilities: Both Infor and Licensee will participate in Integrated System Testing. Infor will have a lead role with Licensee participating and supporting for knowledge transfer.

User Acceptance Testing:

Description/Purpose: User Acceptance Testing is the final phase of testing.

Roles and Responsibilities: Infor will provide example test scripts and Licensee may choose to create additional test scripts. Infor will provide forty (40) hours of testing support to assist Licensee with User Acceptance Testing. A defect log will be jointly managed by Infor and Licensee and regular status meetings will be held to track both progress and outstanding issues.

2.4 Project Work Products and Activities

Throughout the course of the Project, a number of deliverables will be created, and activities performed. The deliverables or activities are listed below.

High Level Deliverables:

- Project Repository – Infor will establish it's Infor's Project On-Line Portal (IPON) for the purpose of collaboration on this project where all project documentation will be stored and is accessible by both Infor and Licensee.
- Project gap analysis, tracked on Excel Issue list
- Project Kick off Meeting Presentations
- A detailed implementation project plan
- Steering committee meeting minutes. *(This is a Licensee deliverable.)*
- Weekly status reports (when engaged) and summarized monthly steering committee reports. *(Weekly status reports – Infor Deliverable. Summarized monthly steering committee reports is a Licensee deliverable.)*
- Issues List *(to be maintained by Infor/Licensee)*
- Project Detailed Budget Report *(This is an Infor deliverable)*
- System Integration plan
- Integration Test plan with test scripts and test cases. (Infor will provide example test scripts and licensee can develop additional)
- Training Materials
- Go-live Readiness Assessment Report. *(This is a Licensee deliverable. Infor PM to provide guidance)*
- Final cut over plan *(This is a Licensee deliverable. Infor PM to provide guidance)*
- Go Live Cutover (Joint activity)
- Functional Technical Support
- Post Go Live Support

Estimate Prepared For : EAM Fleet Maintenance Project	
Tasks - EAM Effort	Resource
***** **Project Management** *****	
Project Management & Tracking (Scope, Schedule, Cost & Quality, OCM, and Mobilization+)	ICS Project Manager
Miscellaneous Project Support Across All Phases	ICS Solution Architect
Project Administration (COE Overseeing Technical Activities / Tasks, Time Sheets, Coordination, scheduling, etc.)	CoE Project Manager
~~ **Project Initiation & Planning Completed** ~~~~~	
***** **Inception** *****	
Confirm Project Objectives & Scope (Alignment Mtg) and Delivery via Project Kickoff (Prep)	ICS Solution Architect
~~ **Inception Subtotal - Milestone - Lifecycle Objective** ~~~~~	**Total Hours**
***** **Elaboration** *****	
EAM IA Prototype Test / Dev Environment Deployment (DB Backup & Restore and provide to the cloud team)	CoE Sr Consultant
Fleet Business Process Review & Reservation	ICS Sr. Consultant (Application)
o Define: KPI, Inbox, Flex SQL (2 KPI's, 2 inboxes, 2 Flex SQL) Requirements	ICS Consultant (Application - Associate)
Integrations Technical Scoping Discovery	CoE Sr Consultant
Configuration Planning and Design (Initial Design Document for Business Processes)	ICS Consultant (Application - Associate)
Configuration Planning and Design review by GDS	CoE Sr Consultant
~~ **Elaboration Subtotal - Milestone - Lifecycle Architecture** ~~~~~	
***** **Construction** *****	
EAM Standard Fleet Configuration (fleet assets field changes and modification)	CoE Sr Consultant
o Include Inspections in Configuration	CoE Sr Consultant
ION Technical Architecture Services (ION Desk, ION Connect, ION Process (Workflow & Alerts) (provided by ION team)	ICS Solution Architect
Infor OS Configure	CoE Sr Consultant
Infor OS Configure	ICS Sr. Consultant (Technical)
IOS ION API	CoE Sr Consultant
IOS Post Installation Services	CoE Sr Consultant
IOS Technical Management	ICS Sr. Consultant (Technical)
Alert Management Development Support (can be included without training if requested)	CoE Sr Consultant
EAM Specialty training (KPI's, Inboxes, Flex, Grids, Messenger)	ICS Consultant (Application - Associate)
KPI / Inbox / Flex Development Assistance	CoE Sr Consultant
Barcoding Installation & Training (Before label design)	ICS Sr. Consultant (Application)
Data Mapping Assistance	ICS Consultant (Application - Associate)
Data Upload / Import Utility Training	ICS Sr. Consultant (Application)
Static Data Upload - Assistance (Test Environment)	ICS Consultant (Application - Associate)
Conference Room Pilot (CRP) - End User Validation - Unit Testing)	ICS Consultant (Application - Associate)
Final Design and Configuration BPR Documentation	ICS Consultant (Application - Associate)
***** **Construction** ***** **Analysis & Design for Custom Extensions** *****	
EAM Construct Integration to IOS Standard BODs	CoE Sr Consultant
~~ **Construction Subtotal - Milestone - Initial Operating Capability** ~~~~~	

***** Transition *****	
User Acceptance Testing Assistance	ICS Consultant (Application - Associate)
Configuration Changes per Test Results	CoE Sr Consultant
Documentation Changes Per Test Results	CoE Sr Consultant
Migrate Production Configuration & Documentation Update	CoE Sr Consultant
Train the Trainer Workshop (max of 5 students)	ICS Consultant (Application - Associate)
Advanced Reports Development Support	CoE Sr Consultant
Go Live Assistance – Application	ICS Sr. Consultant (Application)
Transition to Support	ICS Project Manager

2.5 Project Roadmap and Timeline

Infor proposes an estimated Project schedule duration of approximately 4 months for the Infor EAM Fleet Maintenance implementation. These timelines assume a Project start date of DATE. Any delay of the start date could impact the availability of Project resources, the final production Go-Live date, and will necessitate further discussion to agree on Project schedule.

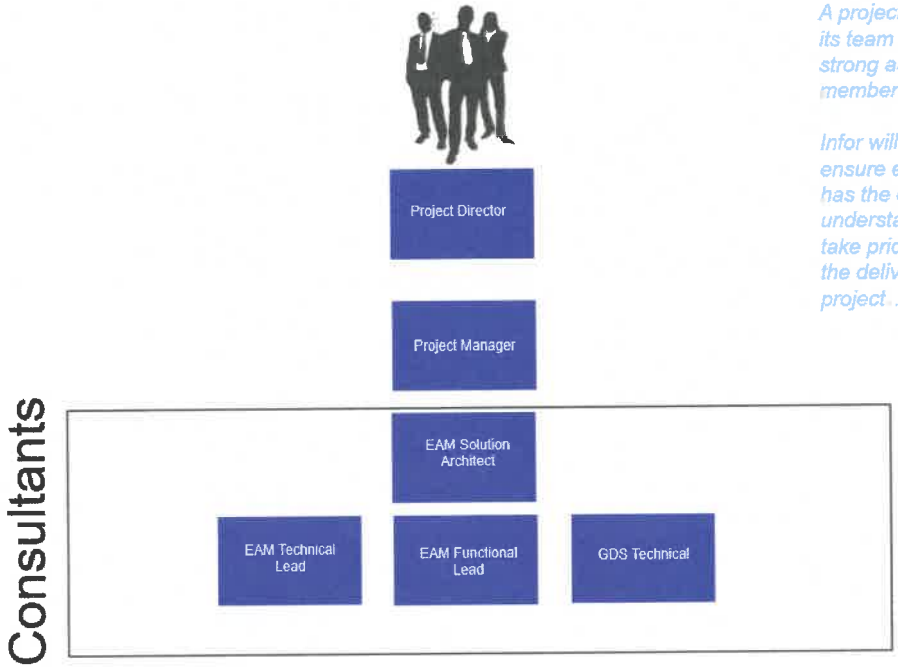
Below is a sample timeline for a 4-month deployment using Infor Deployment Methodology. Licensee dependencies and constraints need to be integrated to the overall project plan once project starts. The Infor Project manager will produce a detailed project schedule as part of the overall Project Management Plan during the inception phase of the project.

Estimate Timeline by Major Milestone

Milestone	Month 1				Month 2				Month 3				Month 4				Month 5			
# of Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Prepare - Inception Phase	X	X	X																	
Configuration Design - Elaboration Phase			X	X	X	X	X	X												
Configuration - Construction Phase							X	X	X	X	X	X	X							
Train & CRP - Transition Phase												X	X	X	X	X				
Go-Live																	X			

3.0 Project Roles and Responsibilities

3.1 Infor Staffing



A project is only as strong as its team and the team only as strong as its individual members…

Infor will work with to ensure each team member has the opportunity to understand, contribute, and take pride and ownership in the delivery of a successful project…

Infor Roles and Responsibilities

Project Director – Responsibilities:

- Overall executive visionary for Project success
- Primary escalation point for Licensee
- Client satisfaction
- Quality assurance of both Infor & Licensee assigned tasks
- Infor resource management
- Detail planning, scheduling deployment & technical resources assigned to the project
- Interfaces with Licensee managers & project executives

Project Manager (On-shore)– Responsibilities:

- Primary contact point for Licensee
- Client satisfaction
- Quality assurance of both Infor & Licensee assigned tasks
- Infor resource management and financials.
- Detail planning, scheduling and analysis
- Manages the Infor application & technical resources assigned to the project
- Interfaces with Licensee managers & project executive
- Shared responsibility with Delivery Director

Project Manager (Off-shore)– Responsibilities:

- Contact point for Licensee
- Client satisfaction
- Quality assurance of both Infor & Licensee assigned tasks

- Infor resource management
- Detail planning, scheduling and analysis
- Manages the Infor application & technical resources assigned to the project
- Interfaces with Licensee managers & project executive
- Shared responsibility with Delivery Executive

Application Leads – Responsibilities:

- Assist Project Managers with specific implementation project deliverables
- Provide application specific education
- Acts as SME in functional design sessions
- Identifies and addresses complex business requirements
- Determines the functional fit and gaps of complex business requirements relative to Infor's core product functionality
- Conducts functional design reviews and provides feedback/recommendations on the appropriate approach
- Ensures requirements are translated into clear specifications for development
- Lead over all Infor application business analysts and configuration consultants

Technical Lead – Responsibilities:

- Technical knowledge of application architecture
- Provide conceptual designs for in-scope configuration extensions
- Consult with Licensee on systems integration of Infor applications to other systems
- Assist Project Managers with specific technical implementation Project deliverables
- Lead over all Infor technical consultants supporting the Project

Infor leverages the diverse and complementary skill sets of our global infrastructure through our Global Delivery System (GDS) which delivers high-value functional, project management, and technical services through an offshore model. Our GDS team will participate in multiple ways throughout this project.

3.2 Licensee Staffing

There are several activities that are required to be completed in a timely manner by Licensee for the Project to stay on track. A delay in Licensee actions (e.g. availability of key users, executive sponsorship, key decisions, development, migration, timely execution of tasks, etc.), may impact execution of Project tasks by Infor and resulting in additional time and/or cost. Licensee will provide the necessary resources to complete the assigned activities which will include, at a minimum, providing the following roles.

Note: ***Multiple Roles may be accomplished by a single Licensee resource.***

Executive Sponsor/Steering Committee (5%-20% time commitment per committee member) – Without proper vision and guidance from a company's executives, many projects fail to reach their desired goals and objectives. The role of the Executive Sponsor and Steering Committee will be to:

- Participate in setting the goals and scope of the project, and
- Participate in periodic status meetings with the Project Team.
- Participate in project issue resolution when necessary.

Project Manager (50% FTE) – An assigned Project Manager should have appropriate decision-making authority. This person will oversee all project activities. These will include:

- Staffing the project with the proper resources.
- Preparing and monitoring the project plan.

- Setting project priorities and assigning tasks.
- Identifying and documenting project issues.
- Providing status reports on the project to the executive sponsors.

This person is usually very familiar with cross-functional requirements and Licensee's goals and has the ability to lead a team of people from various departments. Although this person may be very knowledgeable in certain functional areas, they should not be assigned specific responsibilities for completing the activities associated with one or more applications. These responsibilities should reside with the roles described below.

Subject Matter Experts (25% - 50% time commitment)– These resources will be considered part of the core Project Team and will participate in Project tasks and activities including:

- Acceptance Testing
- Production Support

  Often these experts consist of Application Leads in their respective areas of expertise, as well as other supporting personnel from the various departments. The resources designated for these roles should have:
  - A working knowledge of how the Licensee's processes are performed, and
  - An understanding of the business logic for the current processes.

Technical Experts (25%-50% time commitment) – A team of Technical Experts will be involved in the technical aspects of an integrated system implementation. Examples include:

- System administration
- Database administration
- Web administration
- Data Conversion
- Integration design, development and testing

Testing Lead (20% FTE, will be 100% during end user and system testing)– A team member responsible for:

- Working with the Infor team to deploy and manage the appropriate testing framework.
- Implementing appropriate measurements and metrics to be applied against the Testing Scripts and Scenarios.
- Planning, deploying, and managing the testing effort for each phase of the Project.
- Managing the team members who are conducting the testing to assure proper diligence and precision throughout the testing process.

Application Administrator – Infor recommends that Licensee establish an Application Administrator as a permanent position, continuing after the implementation. The resource designated for this role should have:

- A general knowledge of how the Licensee's processes are performed across all departments, and an understanding of the business logic for the current processes. Expertise in functional administration of the Infor application, or experience in administering complex applications with the ability to learn the Infor application.
- Ability to translate business requirements to technical staff.
- Ability to develop reports for end users, including experience with reporting software (ex. Cognos, Crystal Reports/Business Objects, etc.)
- Serves as first line of support to end users and designated liaison to Infor support resources following completion of the Project
- Monitors integrations with the Infor application and executes appropriate troubleshooting and escalation procedures.
- Serves as liaison with Infor for upgrades, support, and new functionality roll-outs.

As part of the implementation process, the Application Administrator will assist with the following:

- Acceptance Testing

- Production Support
- Assisting with implementing appropriate measurements and metrics to be applied against the Testing Scripts and Scenarios.
- Assisting with the testing effort for each phase of the project.
- Managing the team members who are conducting the testing to assure proper diligence and precision throughout the testing process.
- Coordination of system change processes across departments.

3.3 Licensee and Infor Roles and Responsibilities

Below is a table depicting roles and responsibilities of the Licensee and Infor. In some cases the table shows two 'accountable', and two 'responsible'. This indicates that each party is assigned that designation for their part of the staff.

Legend

R – Responsible:	The party who physically performs the work.
A – Accountable:	The decision maker and approver.
C – Consult/Support/Verify	Input may be solicited relating to the work to be performed and/or the deliverable. This role may verify that work product meets the acceptance criteria, and may be required to support the completion of the task or work product.
I – Inform:	May be (should be) notified as a courtesy, but not a decision maker or approver, nor involved in performing the work.

	Both	Licensee				Infor			
Task/Work Product	Executive Steering Committee	Project Sponsor	Project Manager	IT	Business Users & SMEs	Project Sponsor	Project Manager	PMO	Consultants & SMEs
Define, Develop, Implement and Monitor Project Governance and Implementation Methodology	I	C	R	I	I	C	C	C	I
Identify, Define, Monitor, Maintain and Report Inter-Project dependencies		C	R	I	C	I	A	C	I
Develop Project Report (Status, Issues, Risks, Financials, etc.)- as a Part of Project Governance Process	I	I	R	C	S	I	C	C	C

	Both	Licensee				Infor			
Escalate Project Related Matters Needing Attention	I	A	R	C	C	A	R	C	C
Perform Project Management Functions/Implement Project Governance	I	A	R	C	C	A	R	C	C
Act as Primary Point of Contact for Program Communication	I	A	R	C	C	A	R	C	C
Manage Program Resources, Resolve Personnel Issues, Fix Problems		I	R	C	C	I	R	R	C
Manage Scope (as a part of Project Governance)		A	R			A	R	C	
Manage Senior Management Communication	I	A	R			A	R	C	
Provide High Level Guidance to the Teams		A	R			A	R	C	
Define, Manage, Maintain, Report and Enforce Quality	I	I	A	C	C	I	R	R	C
Meet on Monthly Basis to Review Project Status (ESC meeting)	A/R	C	C			C	C	C	
Meet on Bi-Weekly Basis to Review Project Status (Sponsor Meeting)	A	R	C			R	C	C	
Meet On Weekly Basis To Review Project Status (And All Other Artifacts)		I	A	C	C	I	A	R	C
Define, Design, Perform And Verify Organizational Change Management	I	A	R	C	C	C	C	C	C
Make Decisions On Project Issues (As A Part Of Governance)	I	A	R	C	C	C	C	C	C
Facilitate Business Workflow, Workshops, Pilots To Ensure Meeting Business Requirements		C	C	I	C	A	R	C	C

	Both	Licensee				Infor			
Provide Licensed Software Knowledge And Expertise During Life Cycle Phases Of The Program		I	I	I	I	I	A	C	R
Ensure Infrastructure & Configuration Availability For The Team			A	R			C	C	
Liaison Between Project Team And Business Users		A	R	I	C	I	C	C	C
Define, Develop, Implement, Support Training Plan	I	A	R	C	C	A	R	C	C
Prepare Executive Steering Committee Report And Respond To Executive Queries	I	A	R	C	C	A	R	C	C
Provide Technical Expertise In Support Of Data Conversion Needs And Infrastructure Support		I	I	C	C	I	A	C	R
Unit Testing		I	C	I	C	I	C	A	R
System Integration Testing	I	I	C	I	C	I	A	I	R
User Acceptance Testing	I	I	R	I	R	I	C	C	I

Resource Assumptions and Licensee Obligations

- Licensee acknowledges that all Project timelines are subject to timely provision of resources and performance of obligations.
- Licensee will provide Infor resources after-hours access to the Licensee Project site.
- Licensee will provide, at no charge to Infor, personnel to carry out administrative functions on behalf of the Infor Project team. Licensee may choose to assign multiple people to cover the required tasks.
- The core Project team, including Infor and Licensee team members, will be co-located at a single Licensee location for all onsite Project work.
- Licensee Core Team Members: Licensee will assign to the Project highly experienced representatives from all the areas within scope for the duration of the Project, to ensure all Licensee Project activities are completed within the established Project timeline. These individuals will be qualified to define requirements for their respective disciplines and will be empowered to make process and policy decisions, including deliverable signoffs, and will engage other subject matter experts as needed.
- Licensee subject matter experts (SMEs): In addition to Licensee core team members, Licensee SMEs will be required from affected areas of the business to participate in business process requirements reviews and design workshops. Licensee will ensure these resources are identified

in advance and are readily available to participate in meetings workshops and test events as defined in the Project work plan in order to keep the Project on schedule.

- Licensee will have full time technical resources assigned to the Project, while the Infor Technical Resource will serve as an advisor for all technical activities in this Project. This should allow the Infor Technical Resource to transfer knowledge and ownership of technical tasks to the Licensee technical team, which should result in decreased Infor involvement over time.
- If Licensee decides to assign non-Licensee personnel to the Project team, Infor will assume that these team members represent Licensee and will be empowered to make decisions for Licensee. However, all such non-Licensee personnel must be bound to the confidentiality provisions of the Services Agreement to the same extent as Licensee, and Licensee is responsible for any breaches of such confidentiality agreement by such non-Licensee personnel as if Licensee committed such breach.

4.0 General Project Assumptions and Licensee Obligations

- Any software licenses required for this project will need to be purchased separately by the Licensee and are covered by a separate Software License Agreement. All Licensed Software is subject to the terms of the License Agreement and nothing herein shall serve to modify such terms or expand the scope of the license granted thereunder.
- Any additional requirement(s) not specified in this Work Order, or identified during the course of the Project will be addressed using the Project Change Control Process.
- Licensee will provide office facilities to all Project team members assigned to the core Project team. This includes, but is not limited to, office space, work desks, networked computers, secured filing cabinets if required, team meeting rooms, networked printers, photocopier, telephones, stationery, whiteboards, and internet and remote VPN connection in order to facilitate the effectiveness of the Project team.
- For Services provided at Licensee location, Licensee will provide facilities for Infor personnel. This includes, but not limited to, office space, desks, networked computers, secured filing cabinets if required, team meeting rooms, network printers, photocopiers, telephones, stationaries, whiteboards, internet and remote VPN connection.
- Licensee acknowledges that any delays or changes caused by Licensee, Licensee's employees, equipment, contractors, or vendors may cause an increase in the fees required under this Work Order, including without limitation, delays or changes due to the following: (a) change to or deficiency in the information which Licensee has supplied to Infor; (b) failure by Licensee to perform any of its responsibilities in a timely manner including the supply to Infor of resources and information; or (c) an unanticipated event that changes the service needs or requirements of Licensee. Changes required to this Work Order a result of any of the foregoing events will be handled using the Project Change Control Process.
- Some tasks may be performed offsite by Infor and Licensee staff members. Infor and Licensee staff will have remote access to Licensee's network and systems as necessary to perform such Project activities.
- Licensee will coordinate facilities and availability of Licensee resources for all required testing of the Licensed Software prior to deployment.
- It is assumed that, at the time of the implementation, the Licensee will be active on Infor Xtreme Support with regards to the licenses being implemented.
- After the Project initiation, Licensee and Infor will meet and finalize activities required to accomplish the objectives of this Project, develop a Project plan, timeline, and milestones by both parties

5.0 Service Fees

The hours and rates listed aside the resource role(s) in the table above represent the "Resource Model" and estimated fees for this Work Order. Should conditions change due to scope, revised skills requirements, and/or any other reason that impacts the availability of the resources fulfilling the role(s) listed in the Resource Model, Infor will offer, via the change order process, alternative resource role(s) as applicable to meet the revised requirements and/or schedule.

Alternate role(s) will be charged at the hourly rate aligned with those roles listed in the table below.

*All amounts are in US Dollars, and exclusive of any applicable taxes, unless otherwise specified.

The rates specified above are subject to increase if this Work Order is not executed by:

Staff and Mobilizing the Project Team

After mutual execution of the Work Order, it typically takes two (2) to four (4) weeks to schedule and mobilize applicable Infor resources for the Project. Actual time for this effort varies depending on the number and type of consultants required, and scheduling and mobilization usually includes, but is not limited to, the following activities: (a) developing an estimated project schedule; (b) further defining and confirming resource loads; (c) reviewing proposed Project staffing and estimated hours with Licensee's Project Sponsor; and (d) confirming and scheduling Project kick-off.

Infor recommends this estimated time line be taken into consideration when scheduling the start date of the Project.

Time and Materials Services

Estimated time and costs listed in this Work Order represent an estimate only, and actual Project time and cost may vary from the estimates provided. All Services are provided on a time and material basis. Billing and payment are not dependent or conditioned on delivery or acceptance of deliverables contemplated herein or any other deliverables. Infor will invoice Licensee for all Services and applicable charges on a semi-monthly basis, as Infor renders the Services or Licensee incurs the charges as applicable. Fees do not include applicable taxes, which will be added to each invoice. Licensee will pay each Infor invoice within 15 days of the date on the invoice. This payment obligation is non-cancelable and the amounts are non-refundable. Travel and living expenses are not included in the rates or estimated fees stated herein, and are in addition to such fees. Travel time to and from Licensee's site will be billed at $90 per hour. Overtime rates of 150% or the quoted rate apply for" After hours work" and weekend work. "After hours work" is defined as Services performed between 8:00 PM and 6:00 AM. "Weekend work" is defined as Services performed between 8:00PM on Friday and 6:00 AM on Monday. Holiday rates of 200% of the quoted rate apply to all holiday work. Any time period which the parties have agreed that Infor resources shall be "on call" (i.e. available to perform Services upon customer request) will be billed at one-half of the normal rate, provided that any service provided during such a time period shall be billed at the normal rate.

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

INFOR: _____	**LICENSEE:** _____
Signature:_____	Signature: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Address: _____	Address: _____
Address: _____	Address: _____
Signature Date: _____	Signature Date: _____

Invoices MUST be mailed to:	**Delivery Address:** **If different from above**
Company Name*: _____	Company Name: _____
Contact Name: _____	Contact Name: _____
Address:_____	Address: _____
Address: _____	Address: _____
Phone: _____	Phone: _____
Email Address: _____	Email Address: _____

***If billing entity is different from "Licensee", then, for the avoidance of doubt, Licensee agrees that it remains responsible for the payment of all fees agreed in this Work Order in the case of nonpayment by billing entity.**

IS BEAUTIFUL

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11-Requirements Matrix Responses

The Requirements Matrix Responses are attached to this PDF file and can be accessed via the Attachments menu to the right of this page.

A hard copy and electronic copy of this matrix in its native Excel format is also included in a separate package with the Cost proposal

Attachments

Infor has included the following attachments by reference or as relevant to this proposal response.

- Infor Opens New Office in Charleston, West Virginia Press Release
- Resumes
- Infor EAM Overview
- 5 Best Practices for Fleet Management
- Leading Teams and Projects Remotely
- Infor Support Operations Handbook

Infor Opens New Office in Charleston, West Virginia to Serve U.S. Government Agencies

United States – February 07, 2019, 09:00 AM

Company Anticipates Bringing 100 Technical Jobs to Charleston

NEW YORK – Feb. 7, 2019 – Infor, a global leader in business cloud software specialized by industry, today announced that it has opened a new office in Charleston, West Virginia, to run cloud applications for U.S. Government Agencies (at the federal, state and local level). The office also will work closely with government contractors supporting these agencies.

With more than 17,000 employees, Infor offers purpose-built software applications for select industries, including the public sector. Over 1,500 state, local and federal entities run CloudSuite Public Sector.

Infor anticipates that it will hire 100 technical employees in Charleston in the disciplines of software engineering, cloud operations, and consulting and support services to support its public sector customers. The office will expand as Infor adds additional customers.

"I am thrilled that Infor has chosen to locate a regional office in Charleston, bringing with it more than a hundred new, good-paying tech jobs to the state," said U.S. Senator Joe Manchin of West Virginia. "I'm pleased to have had the opportunity to meet with Infor CEO Charles Phillips and his team on a number of occasions over the last year to discuss our skilled workforce and solidify the positive value of doing business in the Mountain State."

Infor is partnering with Marshall University in Huntington, West Virginia, and with West Virginia State University in Institute, West Virginia (just northwest of Charleston), to build a pipeline of skilled talent that is trained in software engineering, cloud operations, and support services related to Infor products. These universities are part of Infor's Education Alliance Program (EAP), which provides member organizations access to free software used in business computing, as well as hands-on technical training.

"I am thrilled Infor has decided to open a new office in Charleston," said U.S. Senator Shelley Moore Capito of West Virginia. "This announcement helps reaffirm our ability to compete for high-skilled jobs and attract investment from leading global firms, like Infor."

Infor's Coleman Artificial Intelligence Platform is named after the inspiring physicist and mathematician Katherine Coleman Johnson, whose trail-blazing work at NASA helped U.S. astronauts land on the moon. Coleman graduated with highest honors from West Virginia State College Virginia State University), earning bachelor's degrees in mathematics and French.

"I can't tell you how proud I am to welcome Infor to the Mountain State," said West Virginia Governor Jim Justice. "I applaud their commitment to hiring West Virginians and to working with our local higher-education institutions to help keep more of our graduates right here at home. With the expansion of Infor, we can better attract other growing tech companies and show them why doing business in West Virginia is a great investment."

Infor CEO Charles Phillips said, "I thank Senators Joe Manchin and Shelly Moore Capito and many others who assisted Infor in establishing Charleston as a major cloud operations center. Infor has operations in over 200 countries and territories but selected the great state of West Virginia for this important initiative."

The new Infor 12,000-square-feet office is set up to support 100+ employees. It is located on the 6th floor of the 18-story Laidley Tower building at 500 Lee Street East in downtown Charleston – one block away from the Charleston Transit Center and next to numerous downtown businesses.

Tweet This:

@Infor opens new office in Charleston, #WestVirginia, to run #cloud applications for U.S. Government Agencies. http://bit.ly/2GpV1FC

About Infor

Infor is a global leader in business cloud software specialized by industry. With 17,300 employees and over 68,000 customers in more than 170 countries, Infor software is designed for progress. To learn more, please visit www.infor.com.

Infor customers include:

- 19 of the top 20 aerospace companies
- 9 of the top 10 high tech companies
- 18 of the 25 largest U.S. healthcare delivery networks
- 18 of the 20 largest U.S. cities
- 19 of the top 20 automotive suppliers
- 17 of the top 20 industrial distributors
- 15 of the top 20 global retailers
- 4 of the top 5 brewers
- 17 of the top 20 global banks
- 9 of the 10 largest global hotel brands
- 8 of the top 10 global luxury brands

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Samantha Smith
Office of Marketing and Communications
West Virginia Department of Commerce

Brett Rogers

Director, Infor Global Professional Services

Profile

Brett has been with Infor for 16 years, and has over 20 years of experience implementing asset and work management systems for cities, counties, and state-level transportation and maintenance organizations and other Public Sector entities. He is a Director within Infor's Global Professional Services group, and is responsible for the successful delivery of Infor's Work Management, Asset, Inventory, and Customer Relationship Management solutions to clients throughout North America and parts of Europe and Africa.

Brett has presented approaches to product utilization and implementation methodology at Inforum, EAM User Conferences, and at Hansen/IPS User Conferences.

He also participates in developing Infor's responses to prospective clients' requests for proposals, initial requirements analysis sessions, Engage Workshops, and the development of Statements of Work. Based in Atlanta, Georgia, his experience includes business process analysis, change management, large account management planning, and project program management. He leads a complete and veteran team of Project Managers and Consultants to deliver Infor's solutions to our clients.

Industry Knowledge

INDUSTRY: **Public Sector Work Order and Asset Management**

VALUE ADD: **Leadership, Industry Expertise, Project Experience, Financial Stewardship, Urgency, and Customer Service**

- Brett has managed or overseen dozens of successful EAM implementations with state and local governments and municipalities, including the City of Fishers, IN; Miami-Dade County (consisting of over 10 large and unique departments); the City of Calgary, AB; New York City Parks; the City of Tucson, Arizona; the City of Fresno, California; the City of Wichita, Kansas; the City of Vancouver, BC; Hillsborough County, Florida; Bexar County, Texas; Westchester County, New York; the State of Michigan; and the New Jersey Turnpike Authority.
- Brett's implementation experience with specialized agencies includes the Washington State Ferries; the Miami-Dade Aviation Department; Amarillo Airport; Miami-Dade Fire and Rescue; Severn Trent (now Inframark); and Puerto Rico's Centro de Recaudación de Ingresos Municipales (CRIM).
- Brett also oversees Infor's delivery services to major public transportation agencies, including Capital Metro (CMTA); the New York Metropolitan Transportation Authority (MTA); the Chicago Transit Authority (CTA); and Amtrak (with Spear).
- Brett also manages and/or serves as Project Sponsor for all Hansen (now IPS Assets) implementations for Work and Asset Management in the public sector. Some of the hundreds of projects he has been involved with include the State of California Department of Transportation (Caltrans); the San Antonio Water System (SAWS); the City of Austin, Texas; Richmond, BC; Pima County, Arizona; Virginia Beach, Virginia; the City of Portland, Oregon; and the City of Seattle, Washington.
- Brett's international experience includes projects with the Johannesburg Roads Agency (JRA); Abu Dhabi Ministry (ADM); Foskor (South Africa); Wessex Water (Bath, UK); and Jamaica Public Services (JPS - Jamaica's largest electric utility).

Skills

Infor Applications

- EAM
- EAM Mobile and Mobile for Transit
- Birst
- InforOS, Ming.le, IDM
- IPS Asset Management (Hansen)
- IPS Field Inspector
- Infor Deployment Methodology
- Infor Agility

Education

- The University of Arizona, Bachelor's Degree, Political Science

Jamie Saeed

Sr. Project Director

Profile

Driven to excel in Business Process Analysis and Improvement for EAM / MRO applications, Supply Chain Planning applications for the Retail Business Verticals. I am a Quick learner with exceptional organizational, planning and analytical capabilities and Proven Time Management. I am an ardent Organizational Change Management and Data Governance advocate.
30+ Years of experience in I.T. Project Management, Solutions Integration, Marketing and Customer Support. I am a PMP and Member of PMI since 2002 with over 10,000 hours of current Project management / PMO experience. Currently reading for the PMI-ACP certification.

With Excellent Team Management Capabilities, proven Leadership & Interpersonal Qualities. I am conversant with Agile, practicing Scrum and KanBan concepts in hybrid Waterfall and Iterative cycle projects. Comfortable with SSADM and RAD Methodologies

I have demonstrated experience with Sales & Marketing Management in Executive Information Systems, Decision Support Systems, Software Integration Solutions, Sales, Implementation and Service Delivery for Maintenance and Materials Management software solutions, Human Capital Management, Enterprise Asset Management and Project Management packages.

Industry knowledge

INDUSTRY: **Public Sector**

VALUE ADD: **EAM experience at several large Transit organizations**

Facilities Management

- Integrations with IVR and external WFM devices
- Linear Assets
- Mobile Device Field deployments
  -EAM and Scanning Applications
- Transit Rolling Stock
  -Fleet Maintenance
  - Stores and Procurement

INDUSTRY: **Manufacturing Discrete and Process**

VALUE ADD: **Integrated CMMS with Oracle ERP**

- Full cycle EAM implementations
- BPR and Improvements
- Purchasing and Inventory Management
- Work / PM Planning
- Inspections based predictive maintenance management with EAM

INDUSTRY: **Retail - Grocery and Consumer Vending locations**

VALUE ADD: **Demand Planning, Fulfillment, Assortment Optimization**

- Fulfillment
- Assortment Optimization

Promotions Management

Certifications

- PMI - PMP
- JDA Space Planning
- AutoCAD
- Crystal and Cognos Reporting
- Infor EAM
- OPIM, JEM and IDM

Skills

Infor applications

- Infor EAM
- Datastream 7i
- MP5
- Infor LN
  - Project
  - Service
  - DEM

Other non-Infor applications

- JDA Space Planner
- JDA Demand Planning

INDUSTRY: **Pharmaceutical Manufacturing**

VALUE ADD: **Asset Management, Calibrations and Certification**

- Calibrations
- Certification

INDUSTRY: **Facilities Management**

VALUE ADD: **Integrated EAM implementations**

- Inventory optimization, e-Procurement
- Campus, Airport and Commercial Retail

INDUSTRY: **Oil & Gas**

VALUE ADD: **Asset Identification and Data Validation**

- BOM and PM Plans
- Staging Equipment Hierarchies

- Promotions
- Assortment Optimization
- SAP PM
- PeopleSoft Payroll
- Yorvik CMMS

Programming languages

- SQL
- 4GL
- Artemis

Education

- BE (Electronics Engineering)
- PMI Advanced PM Training
- Situational Leadership Training SL4
- 7 Habits Mastery
- Essential Facilitation

Secondary Language

- Urdu
  - Punjabi
  - German

Krishnakumar Hariharan (KK)

Project Manager

Profile

KK is Certified Project Management Professional (PMP) from PMI with overall 23+ years of experience out of which 15+ years span across service delivery, project, program management and IT service transition, operations.

Experienced in managing End-to-End implementation and Support of ERP and Custom applications in the role as "Project Manager". Strong experience in implementing enterprise applications, understanding client's business processes, planning and implementation approach. Handled ERPs - JDEdwards, PeopleSoft and Oracle apps implementation projects both at onsite and offshore. As a part of blended delivery model comprising technical resources from offshore and functional resources from onsite together cohesively deliver the engagements successfully. Also exposure in managing ITIL service transition for infrastructure related projects

In Infor for past 1 year and 9 months handled EAM upgrade, Integration & and enhancements also projects, BPCS/LX upgrade, dEPM-Birst migration, SunSystems and Visual upgrades, CRM and PLM projects.

Industry knowledge

INDUSTRY: **Manufacturing**

VALUE ADD: **Managed BPCS to LX Implementation project**

- Currently handling BPCS to LX upgrade. Multiple EAM customers on upgrades and Integration related projects
- This project is currently underway with ICS,GDS and 3P resources and per revised plan expected to go live by Oct2020.
- Completed CRP1 in Jun'20 due to delay from customer side and planned CRP2 in Sep and subsequently followed by Cutover by Oct'20.

INDUSTRY: **Food and Beverages**

VALUE ADD: **Currently handling dEPM-Birst migration project and also other small project projects**

- Monitor and control the progress of project, managing the constraints (scope, time & cost). Also the resourcing issues and addressing the challenges in this engagement.
- We have mix of ICS, GDS and 3P consultants for this engagement. dEPM we have ICS and GDS involvement and had 3P for Birst component.

INDUSTRY: **Services**

VALUE ADD: **EAM, CRM**

- In Infor also handled EAM projects to various customers related to upgrades, Integration and enhancements. Also Infor CRM for multiple customers.

INDUSTRY: **US Government county (ERP-PeopleSoft)**

VALUE ADD: **Managed HCM and Finance module Implementation project**

- New implementation for the client replacing their legacy system. This implementation catering to the all the employees of the counties.

Certifications

- PMP
- CSM
- MSP Practitioner
- ITIL Foundation
- ITIL Service Transition
- Six sigma Green Belt
- CoBIT Foundation
- ISMS-Lead Auditor-ISO/IEC - 27001-2005

Skills

Other non-Infor applications

- JDEdwards

Education

- Bachelor of Commerce
- Master of Business Administration

- Implemented projects successfully on time and within budget
  Total team size was 52 and executed from both onsite and Offshore, India
- Monitor and control the progress of project, managing the constraints (scope, time & cost).
- Risk assessment, identifying potential risks and mitigating them.
  Managing communications & expectations of all stakeholders.

Thomas N. Didier

Solution Architect

Profile

Mr. Didier is a Solution Architect with Infor Global Solutions. He has over 40+ years as a Computer Specialist working as a Designer, Developer and Implementer of a variety of Application Packages. These include:

- Asset Management
- Payroll/HRM
- Inventory Control
- Financial Packages.

For the past nine years he has worked with the Infor EAM product as an on-site implementation specialist performing all task from initial customer training sessions through planning, design, system configuration and concluding with end-user training and go-live support.

He is skilled in driving out business requirements, optimizing processes, anticipating challenges and roadblocks, and then providing solutions to overcome them. Additional responsibilities include understanding and providing guidance and assistance with Data Cleansing, Data Conversion, Reporting and system customization.

Industry knowledge

INDUSTRY: **Gas and Oil Industry**

VALUE ADD: **Mr. Didier was brought unto this project to provide his expertise in developing and implementing vehicle maintenance programs for light fleet operations.**

- Designed and developed an LDAR monitoring and reporting system.
- Developed a fleet PM maintenance program which included the capturing of usage to trigger maintenance PMs.
- Developed a standardized maintenance model which was rapidly deployed of the clients multiple gas compression plants.

INDUSTRY: **Municipal Government**

VALUE ADD: **Performed implementation from requirements through design and end-user support.**

- Implemented Asset Management, Inventory control, Purchasing and Maintenance processes as utilized by Municipal Governments.

Certifications

- ICCP, Institute of Certified Computing Professionals

Skills

Infor applications

- EAM
- Smartstream
- Payroll/HRM

Other non-Infor applications

- Microsoft Office
- Microsoft Visual Studio

Programming languages

- C#
- COBOL
- Assembler
- Visual Basic
- SQL SQL Server
- ORACLE

Education

- Associate of Applied Sciences Columbus State

Matt Kramer
ICS Consultant

Profile

I am an ICS Consultant with Infor Global Solutions. I have over a decade of experience using Infor EAM products across various industries, ranging from MP2 to EAM V 11.3 I am a certified Professional Engineer with experience providing customer facing direct support for construction management, strategic planning and implementation, workforce/asset/supply chain management and energy optimization. I have designed and delivered core team training, comprehensive system analysis, application implementation and go-live support for EAM clients. I excel in the core competencies of asset management design, business analysis, project management, application development, and user acceptance testing. I offer extensive executive level operational management experience with Federal and local government agencies, implementation experience with Manufacturing, Oil and Gas and Public Sector clients.

Industry knowledge

INDUSTRY: **Manufacturing**

VALUE ADD: **Conversion of Work Management Processes**

- Implemented Legacy application conversion to EAM for 8 sites in North America
- Extracted, streamlined and converted equipment hierarchy and organizational structure
- Updated Preventive Maintenance program for use on Mobile devices.

INDUSTRY: **Public Service**

VALUE ADD: **Project Lead for Organizational Initiatives**

- Led Utility organization to identify and implement cost savings initiatives to reduce operating expenses by 20%
- Designed and implemented state of the art inspection program for major Wastewater Treatment Plant
- Primary architect of significant organizational management revision, working exclusively with Human Resources personnel
- Federal On Scene Commander Experience for HAZMAT, Oil Spill Prevention and Rapid Response Training

INDUSTRY: **Oil and Gas**

VALUE ADD: **Work Management Consultant**

- Guided Business Process Flow documentation, evaluation and improvement
- Implemented customized work flow processes for international organization
- Ensured delivered business application software met ISO 14224 guidelines and all governmental regulations

Certifications

- Professional Engineer
- Institute of Asset Management, Affiliate Member
- WEF, AWWA, ASCE member

Skills

Infor applications

- EAM
- MP2

Other non-Infor applications

- GIS
- InfoWorks®
- CAD
- Cartegraph

Programming languages

- Cobol
- SQL

Education

- United States Coast Guard Academy, BS – Civil Engineering
- California State University, Fullerton – MA Environmental Science

Matthew Costa

EAM Consultant, Associate

Profile

Mr. Costa is a Functional EAM Consultant who is passionate about helping clients solve their business process problems. Mr. Costa's ability to deliver business process and application configuration expertise to Infor clients has contributed to the success of several EAM implementations. Leveraging his experience with Infor EAM and a deep understanding of the functional capabilities of the application, Mr. Costa is well positioned to effectively document and analyze business requirements, streamline processes, lead design workshops, and develop solutions that best fulfill the needs of the client. He delivers results through effective decision making, strong written and verbal communication skills, leadership and team building capabilities, and an unrelenting drive to exceed expectations.

Industry knowledge

INDUSTRY: **Public Sector - Facilities Management**

VALUE ADD: **Statewide EAM Implementation - Lead Functional Consultant**

- The multi-agency project entailed the implementation of Infor EAM as an integrated Facilities and Real Estate Management system with the objective of improving the State's process of managing facility resources.
- Responsible for conducting business process review and requirements gathering workshops, design, build and execution of a Conference Room Pilot, leading design workshops, application configuration, solution design and development, data migration, and creating documentation.
- Worked closely with the customer to understand business requirements and develop future state processes.
- Orchestrated the design, configuration, and documentation efforts related to development of Lease Management, Work Management, and Procurement modules.

INDUSTRY: **Healthcare**

VALUE ADD: **EAM with Calibration Implementation - Functional Consultant**

- The project focused on the implementation of EAM to manage the calibration processes of a medical device testing corporation in a validated environment. The scope of work included migration of historical calibration data from a Paradox database.
- Responsible for requirements gathering and documentation, business process review, application and calibration module configuration, end user training, and data mapping.

INDUSTRY: **Oil and Gas**

VALUE ADD: **SAP to Infor EAM transition - Functional Consultant**

- The scope of the project focused on assisting the business in their transition from SAP to Infor EAM under an accelerated timeframe.
- Responsible for requirements gathering, application configuration and documentation, data mapping and migration, and post go-live support.

INDUSTRY: **Public Sector - Utilities**

VALUE ADD: **EAM - Lead Functional Confultant**

Certifications

- Infor EAM Certified Consultant
- Infor Certified Instructor

Skills

Infor applications

- Infor EAM

Programming languages

- SQL

Education

- Suffolk University
  - Major: Sociology
- Infor EAM Academy

- Responsible for requirements gathering, application configuration, and documentation related to EAM/GIS integration.
- Worked closely with the customer to understand process and objectives, and develop solutions related to integration with service order and financial applications.
- Additional responsibilities included application configuration and data migration in support of enterprise-wide objectives.

Julyan Lee

Principal Consultant, Change Management

Profile

I am a Prosci® Certified Organizational Change Management practitioner with expertise in enabling large and small-scale change initiatives to reach expected business value and projected outcomes. As a recognized dynamic and outgoing leader, I excel at providing innovative ideas that deliver effective solutions for clients. I have experience in Agile and waterfall implementation frameworks. I am focused on providing outstanding Change Management and End User Training outcomes for clients.

Industry knowledge

INDUSTRY: **Professional Services**

VALUE ADD: **National Practice Lead**

- Build OCM standard processes and methodologies.
- Project oversite and Quality Assurance auditing.
- Growing and leading team of OCM consulting resources; including recruitment, onboarding and continued management.
- Exclusive alignment with C-suite executives to coach and provide guidance for their sponsorship roles.

INDUSTRY: **Aerospace and Defense**

VALUE ADD: **Served OCM Lead**

- Created an integrated change portfolio management process.
- Conducted analysis to determine saturation and collision points for ten HR technology projects.
- Developed enterprise change management integration governance model.
- Developed enterprise change management integration forum.

INDUSTRY: **Healthcare**

VALUE ADD: **Organizational Change Management**

- Developed and conducted change readiness assessment.
- Developed OCM strategy.
- Developed and executed OCM integrated project plan.
- Developed and executed tactical communications plan.
- Developed and deployed post-go live support model.

INDUSTRY: **Municipal/Public Sector**

VALUE ADD: **End User Adoption**

Certifications

- PROSCI© Organizational Change Management Practitioner
- Six Thinking Hats Meeting Facilitator

Skills

Infor applications

- EAM
- CloudSuite Industrial
- IDM Framework

Education

- Jacksonville State University

- Develop OCM Strategy.
- Conducted process current /future state process documentation
- Executed OCM tactical activities within the Agile Framework.
- Developer a Release-based change impact analysis process.

INDUSTRY: **Natural Resources**

VALUE ADD: **OCM and End User Training**

- Designed end-to-end forecasting and scheduling process maps.
- Conducted stakeholder collaboration and involvement sessions.
- Deployed optimized/streamlined training administration process.
- Developed transition to support model.

Walter Nicolau

Principal Consultant, End User Training

Profile

I work closely with clients to analyze, design and deliver end user solutions, including end user training, performance support and organizational change management deliverables. As a PMI® certified Project Management Professional (PMP), I manage training development teams through the entire lifecycle of a project. I have experience in a wide range of industries, process areas and solutions including CRM, ERP, HR and EAM systems.

Industry knowledge

INDUSTRY: **Public Sector**

VALUE ADD: **Project Management and End User Training**

- Developed training strategy and delivery plan.
- Developed training curriculum based on blended learning model.
- Developed Train-the-Trainer program and upskill assessment for instructors.
- Managed development project plan for all curriculum areas.

INDUSTRY: **Municipality**

VALUE ADD: **Served End User Training Lead**

- Developed training strategy and delivery plan
  Developed curriculum for ESS, Recruitment, Benefits Administration and Payroll.
- Instructional Design Lead for multi-modal content supporting over 2000 users.
- Developed Learning Sustainment process.

INDUSTRY: **State Parks/Public Sector**

VALUE ADD: **End User Training**

- Managed curriculum design, development and delivery of curriculum.
- Delivered Instructor-Led training for eight courses to over 1600 users.
- Created a detailed training strategy, deployment, and development plan in an expedited manner.

INDUSTRY: **Healthcare**

VALUE ADD: **End User Training**

Certifications

- Certified Scum Master

Skills

Infor applications

- EAM
- CRM
- CSF & SM
- XM
- GHR

Education

- M.A. Instructional Design, University of Maryland
- M.S., Information Technology, University of Maryland
- M.S., International Business Administration, University of Southern New Hampshire
- M.B.A., Management Control Systems and Finance, Gothenburg University

- Served as Program Manager for implementation of Affordable Healthcare Act reform-related training.
- Coordinated training course development and deployment across national healthcare network.
- Provided collection and analysis of training program evaluation and effectiveness.

INDUSTRY: **Manufacturing**

VALUE ADD: **Training Project Manager**

- Manager for post-go live support and stabilization effort for Finance.
- Developed and delivered executive overview presentations in support of OCM.
- Delivered reinforcement training on solution Overview and Navigation to over 200 users.

Infor EAM

Infor EAM Fleet Management

Take control of your performance

Real-world fleet operations are capital-intensive, and success hinges on how well you can track and manage your vehicles and capitalize on opportunities for productivity and cost-per-mile savings. Proactively managing performance is more important than ever. And, with all the pressures enterprises contend with to deliver optimal results, asset management is critical.

Track all of your physical assets and their needs

Trucks, buses, utility, construction, heavy equipment, commercial transportation, and rail fleets—no matter what kind of assets you're running, you need the backing of technology that can drive rapid results.

With Infor® EAM Fleet Management, you can track all of your physical assets, schedule preventive and predictive maintenance, manage spare parts, and create paperless business processes with handheld technology. Not only that, its modular design makes this dynamic component easy to tailor to your particular needs.

- Improve your visibility into all of your physical assets and their maintenance needs with Infor EAM Fleet Management.

Manage your fleet with a trusted solution

Infor has more than 30 years of experience in enterprise asset management (EAM), and Infor EAM Fleet Management has a proven track record for delivering innovation and value to leading companies managing fleets. This best-in-class, feature-rich asset and maintenance component makes it easier to process warranty claims, and better manage tires and fuels. Vehicle performance also improves through more comprehensive maintenance.

Improve your operations and costs

Companies around the globe rely on Fleet Management to optimize the efficiency of their fleets, and to reap the benefits of greater fleet performance and lower downtime for increased productivity and savings. Fleet Management does this by helping organizations like yours reduce breakdowns, track repair histories, and create dependable management of asset warranties. It allows you to track vehicle maintenance, improve tire management, and track warranty information using these key features:

Vehicle maintenance reporting standards (VMRS)—With the automatically populated VMRS standard codes provided by Fleet Management, you can accurately track your maintenance activities for all the vehicles in your fleet and profit from enhanced reporting.

Fuel management—Handle on-site fuel inventory with greater ease and efficiency. On top of that, by integrating Fleet Management with fuel card management systems, you can also track your company's vehicles, fuel, oil, and other fluid.

Tire management—Benefit from pinpoint tracking—capture data for each tire, such as ID, description, accrued cost, and work order history for each vehicle to better manage your tire assets. You can also track all casing through the re-treading process, crediting the unused portion of tire life to vehicle history.

Warranties—Lower overall costs by immediately flagging warranty repairs for vehicle, component, or replacement parts, as well as any asset of a major subsystem when opening a work order. You'll also have the ability to automatically create a warranty claim to your supplier.

Drive greater fleet performance

Infor EAM Fleet Management drives greater fleet performance and profitability for forward-thinking transportation companies by helping them better track and manage their fleets. Capitalize on this comprehensive component to:

- Maximize vehicle lifecycles by reducing breakdowns.
- Track repair histories
- Operate safely and efficiently
- Create dependable management of asset warranties.
- Boost earnings and available operating capital.
- Adapt quickly to changing capital markets.

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5 best practices for fleet management

Always having quality, timely, and reliable data is among the top concerns for today's fleet managers, reports Automotive Fleet. From developing smarter routes, to tracking vehicle maintenance and parts inventory, to improving fuel consumption—having real-time data on your assets is everything. But, to succeed, your fleet managers must be able to make actionable decisions that will reduce your operational expenses—without sacrificing on the quality of your service.

Here are 5 ways better data can improve your fleet management.

1

Register vehicle assets in an asset management system

Running a large fleet can make tracking your assets an unwieldy job. It's likely you have hundreds of assets to maintain, along with purchase orders, warranties, and other documentation. To have a complete understanding of how well your equipment assets are performing, you need to be tracking them from cradle to grave. That means keeping track of the critical information related to your assets, so you can know what vehicles are taking the biggest toll on your resources, what departments are operating most efficiently, and when your assets need to be serviced or replaced—and what their warranties will cover.

An enterprise asset management (EAM) system can help you to track this information by helping you to create inventories of your parts, warranties, and driver data. You can also use your EAM system to track an asset's service history, so you know when it needs to be serviced, replaced, or retired. Most importantly, the data structure created in your EAM system will serve as the foundation for a more effective maintenance strategy.

2

Plan for preventative maintenance

Breakdowns aren't your friend. Not keeping up on preventative maintenance schedules, poor driving, and inferior parts (like tires or brake pads) can all add up to lost time and unexpected costs. Sure, you can run your fleet until you have breakdowns and then schedule maintenance, but as your equipment gets older you'll be facing more breakdowns, resulting in an unacceptable amount of downtime. To be successful, you need to be proactive about your maintenance—handling potential problems before they arise to keep your equipment in the best shape possible. How often do you need to schedule oil changes and other routine maintenance? An EAM system can keep track of these details and send you alerts when it's time to have certain assets brought into the shop for servicing. When you have an effective preventative maintenance schedule in effect, you can prevent problems before they happen—and keep your vehicles on the road.

3

Stay on top of technicians, training, and tools

To run a productive shop, you need to know how your technicians are spending their time. With shop management and time tracking tools you can make sure your technicians are completing their work orders correctly and in a reasonable amount of time. If your mechanics aren't getting through their jobs quickly enough—or maybe they have a lot of repeat work to do—it could be that they need better training, or that they don't have the right tools they need to get their jobs done. Even something as simple as ensuring that all of your service technicians are properly trained on performing tire inspections can significantly help to extend the life of your vehicles. Better yet, by tracking this data, you can see how well your fleet is operating on a daily level and make sure you have the right people and tools in place to keep your service levels high.

4

Track your vehicles and fuel expenses

Though the prices may fluctuate, fuel is one of the biggest costs in fleet management. You can't afford to waste time or money on inefficient routes that regularly take your drivers through high-traffic areas or construction. Additionally, proper driver training can help you to reduce wasteful driving practices. That's why you need to be able to send real-time route or traffic alerts to your drivers, so they are using your vehicles efficiently and not wasting fuel. Updating your vehicles with the most up-to-date technologies—like an onboard computing system—can keep your drivers connected to the back office to receive alerts. In addition, outfitting your drivers with wearable technologies like smart watches or mobile devices like tablets or smart phones can help you to communicate in real time—keeping your routes efficient and your fuel expenses in line. Looking towards the future, autonomous vehicles, machine-to-machine (M2M) communication, and Internet-of-Things (IoT) enabled vehicles and assets will revolutionize how fleets are run. Lastly, by taking advantage of these technologies, you'll also be able to quickly respond to customer service issues.

5

Manage your parts inventory

Managing your inventory levels means making sure you always have the parts you need when you need them—and not just storage rooms filled with parts you no longer need. Your EAM system can help you to manage the purchasing of inventory parts so you can cut down on purchasing redundant or obsolete inventory. It's also good to know what parts have a high level of use and are constantly being reordered. Your EAM system can help you to track your parts as they're coming and going. Are you spending a lot of money to maintain vehicles that are getting towards the end of their usefulness? Are your mechanics not installing certain parts properly? Are you still ordering parts for equipment that's about to become obsolete? By tracking your parts inventory, you'll know.

Ultimately, all of the operational information that you're tracking can give you insights into how all facets of your business are performing. From your inventory, to servicing, to fuel expenses, to your asset inventory, keeping track of all of the data your organization produces will create a larger picture of how you can run your fleet more efficiently.

To learn more,
visit Infor EAM ›

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Being a software and professional services company, infor is used to running teams and projects remotely, either partially or even in their entirety. We have a number of process and tools in place that help drive the right behaviour to ensure that projects deliver value and results, as per targets set.

We do realize that, under the new 'remote paradigm' imposed on us by the Covid-19 current health crisis, not all our customers may be comfortable at participating in or leading remotely managed projects. With this in mind we have prepared this document, to share our experiences and offer some guidance and tips to our valued customers.

Behavior

Both project managers and project team members are not necessarily used to a remote way of working and may be facing personal and team-related challenges.

Project leads need to realize that in a remote context, there are very few opportunities for having casual contact with team members (think "water cooler") and it is important to be more intentional. Hence, make sure to regularly contact the team members for a casual chat, preferably through a video call.
With management by 'wandering around' no longer an option, leadership by 'webcam' is the way forward.

Everyone recognizes that having the right technology tools is important, however, we should also recognize that most of us tend to use tools 'on the fly', without really taking advantage of hidden features that can make a remote working life easier, e.g. use of Microsoft Planner for task assignments, use of whiteboarding with Webex, collaborative editing of documents with Microsoft Office 365 etc. Therefore it is recommended to organize mandatory tools training for all team members. This will help change how the team uses the technology tools to the group's benefit.

Enabling Tools

In order to enable both structured (planned) and unstructured (unplanned) means of communication the following type of tools are required:

- Video-conferencing facilities, bespoke or through the web
- A collaborative platform, such as MS Teams, Webex, Skype, etc, preferably with dial-in options in case of network issues and with meeting recording option
- A common chat application, such as WhatsApp, for both informal and formal communication using a 'group' function
- A centralized file-sharing facility, such as Sharepoint, OneDrive or shared network drives, to create a project documentation repository
- Classic email and phone

Whichever tool or platform is used, it is important to establish a few ground rules for their use:

- Encourage the use of video call
- Common understanding that there is a difference between a chat-group and more formal email, and what to use when
- All team members to maintain all appointments, meetings etc diligently in the calendar application

Leading Teams and Projects Remotely

Communicate, Communicate

Managing projects remotely is in essence not that different from managing on-site. All the good project management principles continue to apply, however there are some nuances that need to be highlighted here.

Plan ahead in detail

It is recommended to derive a detailed 2-week rolling plan from the master plan, with detailed tasks for each individual. This plan is shared among the team so everyone knows what everyone else is doing. Set weekly goals. Practice learns that team members working remotely will on average need more time to complete tasks, make sure to take this into account when preparing your detailed work breakdown structure.

Communicate well, communicate often

You cannot over-communicate, however there is a fine line between being perceived as over-bearing instead of caring... we recommend a clear communication approach as follows:

- Daily stand-up call at the start of the workday – this gets everyone engaged, and allows for call-outs of help needed, exceptions, etc. This call should use a fixed format, consume limited time, and should use a structured task-list as supporting documentation
- Other project meetings can be planned as per project requirements. Formal team meetings should preferably be recorded
- Optionally, have another stand-up call in the evening to confirm what has been done, and handle any common issues that occurred during the day
- For ad-hoc communication during the day, use the group chat
- Try to avoid email glut, and try to send concise, short email messages
- Make sure to come prepared to every conference call and expect the same of your team, so calls with larger groups can be kept to a minimum duration

Rehearse critical activities

Make sure to prepare and "dress rehearse" all important meetings and workshops – we all have been there when the meeting infrastructure breaks down during a meeting. It is good practice to organize a "pre-meeting" call with a core team to ensure that connectivity, meeting tools etc are in good working order.

Work-life Balance

Take a break

When working from home, there is no more home-work travel, no walk to the lunch-place, etc. We tend to be desk-bound all day and it's good to schedule active breaks regularly in your daily calendar. No one expects you to be 'on line' all the time.

Celebrate success

Maintaining a positive team spirit in a 100% remote context requires regular informal contacts, and success should be celebrated often: meeting milestones, personal successes etc.

Get personal

Some people thrive when working from home, others severely miss social contact and risk depression. As a leader, have 'check-in' calls often and offer help where necessary.

Accept distractions

Not everyone has been fully prepared to work from home. We are all human, and having a child jump in front of the camera or getting noise in the background will happen. Let's embrace this as part of our new "working from home" reality.

We are here to help

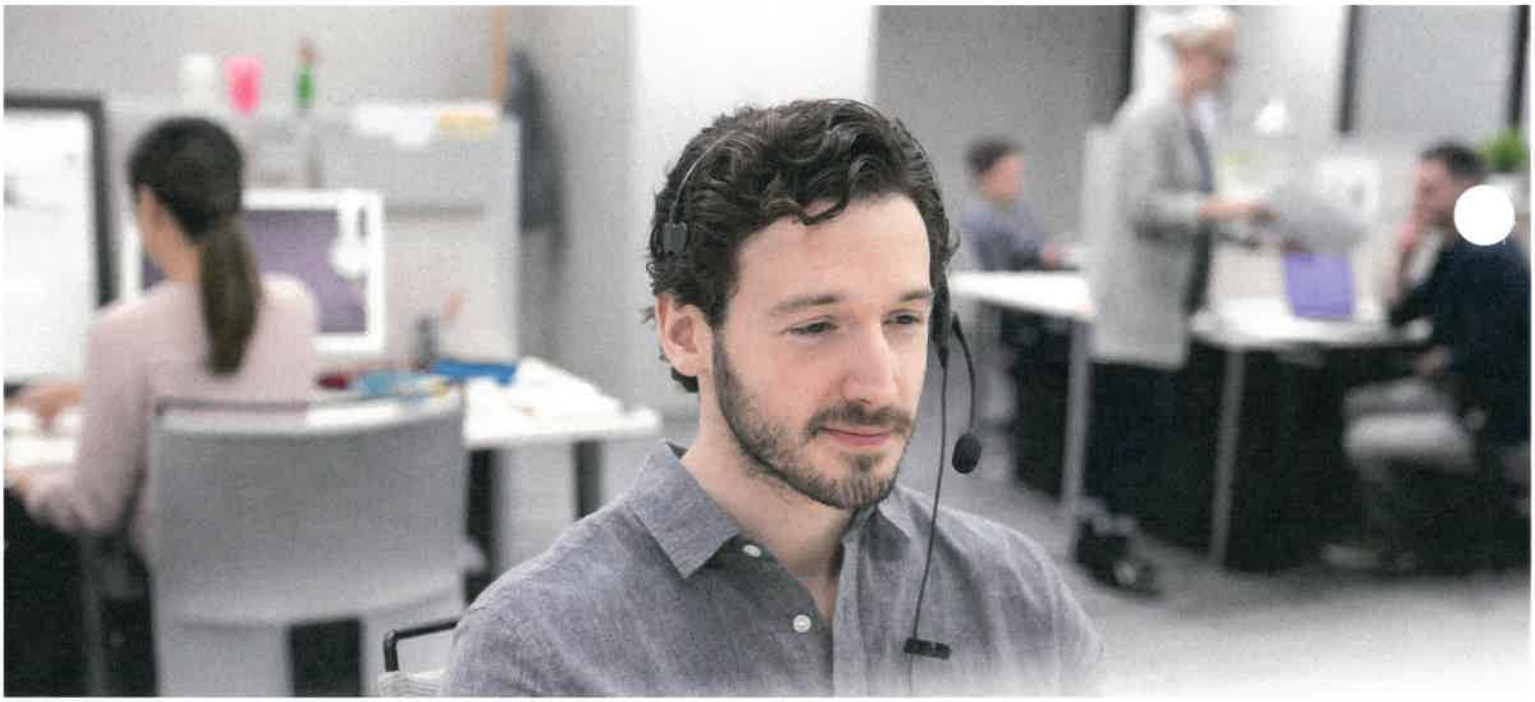
The Infor Consulting Team and Customer Success Managers are ready to help you with additional advice, do not hesitate to contact us.

Good luck, and stay safe!

Resources

Managing remote teams: search at LinkedIn Learning Resources or Lynda.com; multiple courses available

Cisco Webex: link
Microsoft Teams training: link
Microsoft Productivity Tools Webinar (YouTube): link



REFERENCE GUIDE

Support Operations Handbook

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Overview

This Support Operations Handbook has been developed to communicate how the Infor Support team engages with Licensees to provide Support. This document summarizes key features of Infor's Support offerings and addresses common areas of inquiry by Licensees. This document does not replace or amend any rights or obligations set forth in Licensees' agreement(s) with Infor. Licensees of Subscription Software should also reference the Subscription Services Guide for additional details, as the Subscription Services Guide serves as a supplement to this Support Operations Handbook.

Infor offers two Support plans, as follows:

Essential Support includes support for an unlimited number of Incidents, online support through Infor Concierge, 24x7 access to Infor's Support portal, and priority queuing based on the severity level of an Incident.

Note: This Support plan is no longer available to new Licensees, but Licensees that purchased Essential Support prior to May 2017 and remain active on Essential Support may continue with this Support plan for applicable Software.

Premium Support includes all the benefits of the Essential Support plan, plus extended critical incident support 24x7 (as specified herein) and live, interactive briefings.

The services offered under each Support plan are subject to change and may not be available for all Software.

A general description of Infor's Support offerings is located at: www.infor.com/support/support-plan-features. The following information provides supplementary detail on Infor's Support offerings.

In connection with the Essential and Premium Support plans, Infor offers the **Infor Customer Success Plus program**, which is available for an additional fee.

Some of the key offerings of this program are:

- One-on-one instruction to help maximize Infor resources, people, and systems
- Onboarding and provisioning coordination and guidance
- Discussions on basic data usage and opportunities for increased utilization
- Collaboration opportunities with Infor senior development resources on high-level product requirements
- Inforum attendee incentives and executive session for Infor Customer Success Plus program members

A general description of the Infor Customer Success Plus program can be found at: go.infor.com/customer-success-plus.

Definitions

"Component System" means any one of the computer software programs that is identified in the applicable order form or other ordering document as a software product being licensed and supported by Infor (and may be referred to in a legacy agreement as Products, Software Products, Software, Programs, or Licensed Programs). Component Systems owned by a Third Party may also be referred to in the underlying software license agreement as Additional Software, Third-Party Products, or Third-Party Software.

"Customer Care Team" means certain Infor employees who are responsible for creating and updating Incidents that have been reported via telephone, managing access to Infor Concierge, and generating license keys for Licensees, if applicable.

"Incident" Is the general definition of a Support Incident, which is a single, reproducible issue, problem, or symptom. An "Incident" for purposes of Infor Support is a request for assistance, or a question fully and accurately logged within Infor Concierge that is related to Infor Software operation, Software keys (if applicable), or information requests about Infor Support offerings. Other commonly used names for an Incident are "case," "inquiry," "call," "log," "issue," and "ticket."

"Infor," "our," or "we" refers to Infor (US), Inc. or one of its affiliated entities (and their respective predecessor companies) that has entered into license agreement(s) with a Licensee, and if applicable, a Support agreement.

"Infor Concierge" means the Infor Support website that provides Licensees with the ability to log issues; search the Product Knowledge Base; participate in Infor Support Communities; download available updates, enhancements, and modifications; view Infor contacts; pay invoices; and other self-service functions available to all Infor Support Licensees who have a valid Support /Subscription Services agreement in place with Infor.

"Infor Support Center" means a local, regional, or central location that handles all inbound and outbound communications with a Licensee via the telephone or through Infor Concierge.

"Infor Support Communities" is an online channel available through Infor Concierge that enables Licensees to communicate with their peers who have licensed the same Infor Software.

"Licensee," "you," or "your" refers to the entity that has purchased Support or Subscriptions Services, as applicable (from Infor or an Infor-authorized partner or distributor), for a Support Period.

"Product Knowledge Base" or "Knowledge Base" means the centralized repository of information specific to Infor Software.

"Software" means Component Systems and/or Subscription Software, as appropriate given the context.

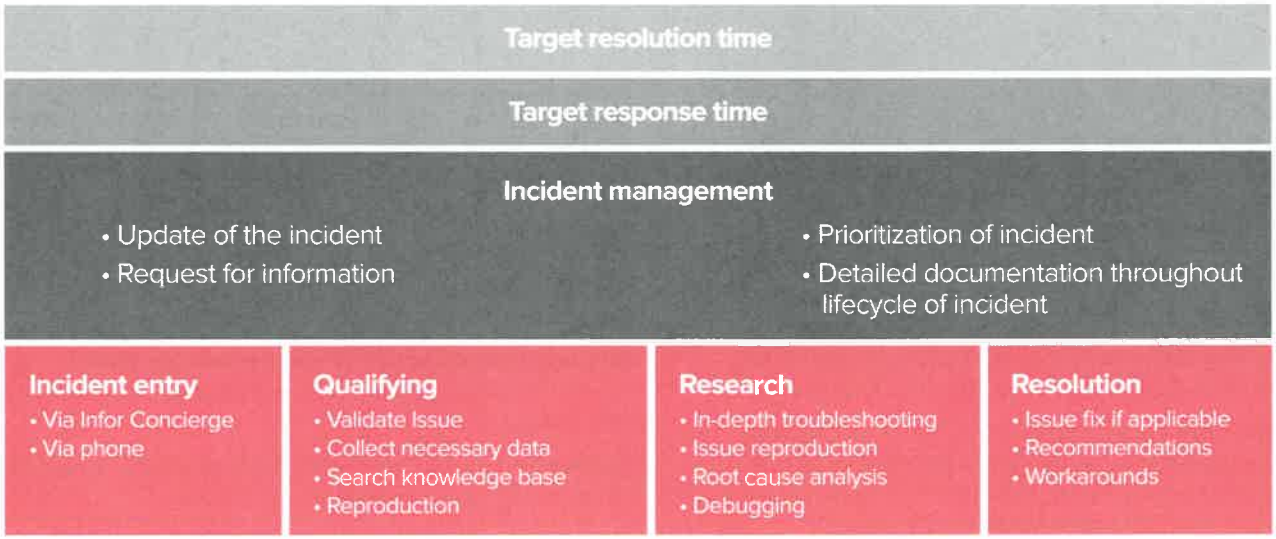
"Subscription Services" means the Subscription Software-related application hosting services and Support that Infor provides a Licensee under the applicable agreement.

"Subscription Software" means collectively or individually the computer software programs identified in the applicable order form or other ordering document for which Infor is providing the Subscription Services.

"Support" refers to Infor's then-current standard maintenance and support services for its eligible Software, as applicable (and may be referred to in a legacy agreement as Maintenance, Maintenance and Support, Maintenance Services, Annual Support, Support Services, On-Going Support, or One Point Support). "Support" may also be used generically to refer to the Infor Support organization, as applicable.

"Support Period" refers to the applicable twelve (12) month period for which a Licensee has paid Infor for Support or Subscription Services, as applicable.

"Workaround" refers to a temporary resolution or a reduction of the severity of the business impact. A workaround may include a modification to the code, a recommended change in the process, or changes to configurations. In some cases, the temporary resolution will be considered the final resolution.



Infor Support model

Infor's Incident management Support model includes four main areas:

- Incident entry
- Qualifying
- Research
- Resolution

- **Incident Entry**: A Licensee may initiate an Incident via Infor Concierge, located at concierge.infor.com, or by calling one of the Infor Support Centers, as referred to in the "Accessing Infor Support" section below. When a new Incident is entered via Infor Concierge, it is automatically routed to a Support analyst, or to the appropriate queue to be picked up by the next available Support analyst. Another option is to call the Infor Support Center and speak to a member of the Infor Customer Care Team. The Customer Care Team member will ask for specific information about the Incident, including a short description of the issue. The Incident will then be routed to the appropriate Support analyst or appropriate Incident queue to be addressed by the next available Support analyst.

- **Qualifying**: Once an Incident has been received, the Support analyst may contact the Licensee for additional information. Clarification of the Incident may be necessary before in-depth analysis can be performed and before the Support analyst can begin to resolve the Incident. Qualification steps may include, without limitation, searching the Product Knowledge Base, reproducing the reported issue, and/or collecting additional information to validate the issue.

- **Research**: Using the results from the qualifying step, the Support analyst will perform further research and testing to help resolve the Incident. This may include, without limitation, debugging, root cause analysis, reproduction of the issue, and in-depth troubleshooting. If the Software does not work in accordance with then then-current documentation, Support will work with Infor development and proactively notify the Licensee of any updates to the Incident.

- **Resolution**: Infor will propose a solution that we believe resolves the issue. It will be the responsibility of the Licensee to close the Incident, which can be done at any time. Most Incidents are resolved by the Support analyst working with the Licensee, and are closed upon mutual agreement of resolution, or they are closed unilaterally by the Licensee. Incidents that involve Software not working in accordance with the then-current documentation will be scheduled and addressed, with the higher severity level issues being given priority. The open Incident will be periodically updated with the new information. Notwithstanding anything to the contrary set forth above, not all resolutions require an actual fix and may be resolved with a workaround or other recommendations, as solely determined by Infor.

Resolution Process: Incident resolution is often an investigative process that is iterative, with many variables, and at times requires collaboration and troubleshooting by various teams within Infor and a Licensee to bring the Incident to resolution. The nature of this process makes providing target resolution times difficult. Infor works to allow a Licensee to continue to do business while Infor investigates the cause of an issue and provides regular updates to the Licensee as Infor progresses through the troubleshooting process.

Accessing Infor Support

You may contact the Infor Support Center by submitting an Incident via the web at concierge.infor.com, or by placing a call during Infor's scheduled business hours. For a complete listing of the Infor Support Center phone numbers, please access the Infor corporate website at www.infor.com. Click on Contact Us, and scroll down to the US Support section where you will find a link for "International support numbers." A Licensee receives 24x7, online access to a variety of Support services. Infor Support encourages online entry of Incidents—a method that enables Infor Support analysts to more quickly begin analyzing the issue and researching the resolution. Online access can be requested from a Licensee's Infor customer/contact administrator or by contacting the Infor Customer Care Team. In addition to logging a new Incident through Infor Concierge, a Licensee can access other Support services and capabilities including:

- Viewing and updating the Licensee's Support Incident history and status
- Accessing Product Knowledge Base articles
- Accessing Frequently Asked Questions (and Responses)
- Accessing latest Software information about new releases
- Downloading Software upgrades
- Locating Infor contacts with up-to-date contact information (including phone number), and starting emails to contacts with one click
- Launching Infor Consulting Services requests
- Recommending education courses based on licensed apps
- Logging Product Enhancement Requests
- Confirming Infor product Licenses and Subscriptions and accessing documentation and product lifecycle policies
- Accessing key resources like the Compatibility Matrix, Documentation Central, and the Infor Demo Center
- Participating in Infor Support Communities with other Licensees to share suggested practices and resolutions to business challenges
- Accessing the Licensee's environment information
- Accessing the Licensee's analytics, which provide information on Support experiences with regard to Incidents, customer satisfaction, the Product Knowledge Base, and the Licensee's interactions with Infor.

Incident management

Reporting Incidents: A Licensee should document and report all Incidents to Infor in order to help Infor Support diagnose the issue. In order for Infor Support to effectively address an Incident, a Licensee should have the below information readily available when logging an Incident. Doing so can help Infor provide a timelier response in a more effective manner.

- The Licensee is responsible for notifying Infor if data to be accessed is compliance sensitive (e.g., subject to ITAR, HIPPA, etc.)
- The Licensee's Infor customer number and contact details (name, email address, and contact number)
- An accurate prioritization of Incident based on defined severity levels
- Details of the Incident (e.g., error messages and how to reproduce the error)
  - If the Licensee is logging via Infor Concierge, screenshots and output examples should be included
- Description of the issue's frequency and predictability (e.g., intermittently, each time function is used, etc.)
- Description of the business impact (e.g., Does it impact all users? Does it occur on all devices?)

Severity levels: Incidents affecting a Licensee's Licensed Software (Software may be referred to below as "Application") are classified according to the following severity level descriptions, each Incident must have a severity level assigned to it, and the appropriate severity level must be provided as part of the information related to such Incident. The Licensee and Infor Support will use reasonable business judgment to mutually identify the severity level of the Support Incident according to the following severity level descriptions:

Severity level	Description	Definition
1	Production Outage/ Critical Application halted	**Infrastructure (Outage)** ▪ Production system is unavailable for all users ▪ A complete loss of service in production system, or service is so severely impacted that you cannot reasonably continue operations **Application** ▪ A defined critical business process failure
2	Major impact	**Infrastructure** ▪ Non-production system is unavailable to all users ▪ Production system is unavailable for many users (e.g., department-wide) **Application** ▪ A defined critical business process is impaired, causing serious disruption to operations ▪ Major business process in production system is halted and no acceptable workaround exists
3	High impact	▪ Non-production system is unavailable to some users ▪ Production system is unavailable for some users ▪ Major business process is impaired, causing disruption to daily functions
4	Standard	Questions regarding functionality of the Software, a non-critical issue, or issues where an acceptable workaround exists
5	Minor issue or suggestion for Enhancement	A minor issue or General Inquiry, or a suggestion is made for enhancing the Software by adding new features or improving existing features

Critical Incident Support (CIS)—included as part of both Support plans:

Infor Essential Support plan—CIS Severity 1: Application-related issues, as defined in the above table, will be supported 24x5 until the Software is operational, a commercially reasonable workaround is in place, or the Incident severity can be lowered. Coverage begins at 12:00AM Monday through 11:59PM, Friday, local time in the Licensee's time zone. Licensees running Infor Subscription Software receive 24x7x365 Support for Severity 1 infrastructure outages of production systems and Severity 2 infrastructure outages of non-production systems, as defined in the above table.

Infor Premium Support plan or Customer Success Plus Program (with either Essential or Premium Support)—CIS Severity 1: Infrastructure outage and critical application halted situations will be supported 24x7x365 until the Software is operational, a commercially reasonable workaround is in place, or the Incident severity can be lowered. In addition, for Subscription Software Licensees, Severity 2 infrastructure outage of a non-production system, as defined in the above table, will also be supported 24x7x365.

Critical Incident Support outside of standard Support hours may be delivered in English only and covers only the generally available unmodified version of the applicable Software.

Critical Incident Support requires access to the Licensee's personnel both during and outside of standard Support hours.

Escalation management: Escalation beyond standard procedures is reserved for issues that merit a higher degree of attention, and such escalation is not intended for issues that are well-suited to Infor standard operating procedures. If a Licensee believes that an issue needs a higher level of attention, the Licensee should contact the regional Infor Support Center and request that an Infor Support manager become involved. If merited, the Customer Care Team will escalate the issue and notify the appropriate Support manager. The Support manager will act promptly to assess the situation, and if appropriate, contact the Licensee to discuss the resolution plan, identify required resources, and implement the resolution plan.

Infor Support responsibilities

General: Infor Support is available for all Infor-owned Software and for certain specified Third-Party Products. Providing Support for Third-Party Products may require Infor and/or the Licensee to interface with other software suppliers (where applicable) to help resolve Support Incidents. Licensees may only access and enjoy the benefits of Support for licensed Software for which they have purchased Support or Subscription Services, as applicable, for the covered Support Period.

For all Infor Support plans/programs, Infor's primary responsibilities are:

- Providing guidance and offering tips and techniques regarding supported Infor Software
- Troubleshooting issues with Infor Software when a Licensee experiences unexpected results
- Reproducing discrepancies and assisting in providing alternative methods to help maintain stability until the discrepancy is corrected
- When available, providing Software updates, enhancements, and modifications that may include fixes for Incidents and minor and major releases

Non-Production Server Support (applicable to on-premises deployments only): For details regarding Support purchased specifically for non-production servers, (e.g., active disaster recovery server) please reference the applicable ordering document and/or agreement between the Licensee and Infor evidencing such Support.

Support for any non-production server Incident consists solely of Support for the Infor Component Systems running in these environments—in accordance with the parameters of the applicable Support plan. It does not include, for example, and without limitation, the disaster recovery failover/recovery process or data synchronization between servers—both manual and automatic.

Lifecycle Support Information (applicable to on-premises deployments only): Infor's current policy is to make available Support for all Infor Component Systems for as long as it is commercially practical and technically feasible.

However, Infor will periodically evaluate product families to determine whether there are an appropriate number of Licensees willing to invest in annual Support contracts, and Infor will communicate any substantive Support changes to Licensees proactively. Please contact Infor Support for the lifecycle information regarding a Licensee's specific Component System(s); this information is also available on Infor Concierge.

The support of Third-Party Products and databases used by Infor Component Systems can be provided as long as these Third-Party Products and databases are supported by support plans from their respective vendors, which coincide with the terms and conditions of the then-current Infor Support offerings, and provided further that Infor maintains a contractual relationship with such vendors that permits Infor to provide the same level of Support for such Third-Party Products and databases that Infor then-currently offers under applicable Support plans.

Infor Support Coverage limits: Infor will respond to all Support Incidents; however, Infor, in its sole discretion, will only spend up to fifteen (15) minutes on any Incident that is outside the scope of Infor Support. Without limitation, this applies to the following areas:

- **Implementation setup**—Any implementation issue, such as business flow processes, configurations, or for on-premises deployments; or the installation of Third-Party components, such as databases and operating system (OS), benchmarking, training of users, etc.
- **Application optimization**—Assistance in analyzing, testing, or improving the performance of the Infor Component Systems for on-premises deployments
- **Hardware/operating system**—Any Incident regarding assistance with the hardware configuration, operating system tuning, or database administration tasks for on-premises deployments
- **Modified objects (customizations/custom code)**—Infor provides Support for Infor's standard code set; this does not include analyzing the code of Software customizations; customization support services are generally available through our Infor Services organization
- **Data correction**—Incidents related to data corrections or corruptions that are not caused by the malfunction of the unmodified standard Software
- **Test or development Server**—Troubleshooting issues regarding Software functionality when conducting a test on a test server or development server
- **Training**—Training and education are provided through Infor's Services organization; if you are unsure whether the issue is a Support Incident or whether it requires consulting or training services, please follow the Incident submission process within Infor Concierge; a Support analyst will work with you to determine the appropriate course of action

In order to help serve all of our customers efficiently, Infor Support will refer Licensees to Infor Services to assist with these types of issues. In the event the Licensee wishes to engage Infor Services, Infor Support will arrange a hand-over to the Infor Services organization to help transition the applicable findings. The Licensee may log a request directly with Infor Services using the Infor Marketplace tool at www.infor.com/services.

Support plans

Infor currently offers Support for all Infor-owned Software.

The detailed description of all components of these offerings and their current features are set forth below:

Note: The Essential Support plan is no longer available for sale to new Licensees, but it is still offered to Licensees who purchased Essential Support prior to May 2017 and have remained active on the Essential Support plan for the applicable Software.

Essential Support Plan

Feature	Description
Telephone Access to Infor Support Services	Infor's Support Center's business hours are generally Monday through Friday, 8:00AM to 5:00PM, local time in the Licensee's time zone, excluding holidays observed by Infor that fall within the applicable coverage window. These hours may vary based upon the Licensee's Software. Please refer to Infor Concierge, as Support hours by Software are noted in specific Knowledge Base articles.
24x5 Critical Incident Support	Critical Incident Support for Severity 1 Incidents is generally available Monday through Friday. This service will also be available during holidays observed by Infor.
How -to Assistance	Licensees can speak with Support analysts, who will help answer procedural questions, including questions about processes, Software functionality, and features of generally available Software.
Defined Incident Response Targets*	Responding promptly to Licensees' requests is an important goal of the Infor Support team. The "Response Target(s)" below are calculated as the difference between the time an Incident is appropriately logged into Infor Concierge and the time of Infor's first value-added communication. Value-added communication may include, without limitation, requests for additional information, the collection of error logs, findings from initial issue triage, timeline for the next step, or providing existing information from the Knowledge Base. **Infor will make commercially reasonable efforts to respond, based on the following targets:**
Severity 1	Within fifteen (15) minutes for Infrastructure Incidents, and within one (1) hour for Application Incidents (24x5)
Severity 2	Within two (2) hours for Infrastructure Incidents (24x7), and within two (2) business hours for Application Incidents during scheduled coverage hours
Severity 3	Within two (2) business hours during scheduled coverage hours
Severity 4	Within four (4) business hours during scheduled coverage hours
Severity 5	There is no set response target for Severity 5 (Minor issue or enhancements) If you do not see the Severity 5 option available, this means your Software utilizes the enhancement request system to enter enhancements requests. You can locate the enhancement request system via ers.infor.com/Ers/Login.aspx.
Unlimited Incidents	There is no limit to the number of Incidents that can be submitted.
Electronic Support	Infor provides 24x7x365 online access to Infor Concierge.
Knowledge Base	Infor Concierge provides access to the Knowledge Base and other resources that can help a Licensee find answers to outstanding questions, including links to available fixes.
Electronic Support	When necessary, and with the Licensee's permission, Infor Support analysts will remotely access the Systems associated with Infor Software to help analyze and help resolve any complex issues that the Licensee may be experiencing. Infor Concierge contains further details and necessary instructions.

Feature	Description
Access to Software Patches and Service Packs	Generally available fixes and patches can be accessed via Infor Concierge. These often include statutory and regulatory updates and issue corrections.
Software Updates and Feature Packs	Infor Concierge includes Software enhancements, updated releases, issue corrections, documentation updates, and related release notes.
Critical Solution Notification	Infor Concierge enables each Licensee contact to develop a unique profile. Each contact may also choose to sign up for Knowledge Base articles that may be of interest. When Infor develops a Knowledge Base article for a critical Incident, the Licensee contact can receive a notification about its availability and how to access it.
Recorded Briefings	Infor provides Licensee with access to recorded webinar Support briefings (lasting an average of 5 to 15 minutes), which are designed to help Licensees become familiar with the latest Infor Software functions and features.
Priority Incident Queuing	Incidents are handled based on severity; a Licensee's most-critical issues are handled as a priority.
Infor Support Communities	Infor Support Communities were developed as a social networking forum—allowing Infor Licensees, partners, and employees to share suggested practices and possible resolutions to challenging or complex business issues.
License Keys	Access to License keys is available within the scope of a Licensee's Software License and/or Support agreement, as applicable.

Premium Support Plan

The Premium Support plan offers all the benefits of the Essential Support plan, plus the following:

Feature	Description
24x7 Critical Incident Support	Critical Incident Support for Severity 1 Incidents is available 365 days a year, 24 hours per day. This service will also be available during holidays observed by Infor.
Defined Incident Response Targets*	Responding promptly to Licensees' requests is an important goal of the Infor Support team. The "Response Target(s)" below are calculated as the difference between the time an Incident is appropriately logged into Infor Concierge and the time of Infor's first value-added communication. Value-added communication may include, without limitation, requests for additional information, the collection of error logs, findings from initial issue triage, timeline for the next step, or providing existing information from the Knowledge Base. **Infor will make commercially reasonable efforts to respond, based on the following targets:**
Severity 1	Within fifteen (15) minutes for Infrastructure Incidents, and within one (1) hour for Application Incidents (24x7)
Severity 2	Within two (2) hours for Infrastructure Incidents (24x7), and within two (2) business hours for Application Incidents during scheduled coverage hours
Severity 3	Within two (2) business hours during scheduled coverage hours
Severity 4	Within four (4) business hours during scheduled coverage hours
Severity 5	There is no set response target for Severity 5 (Minor issue or enhancements). If you do not see the Severity 5 option available, this means your Software utilizes the enhancement request system to enter enhancements requests. You can locate the enhancement request system via ers.infor.com/Ers/Login.aspx.
Live, Interactive Briefings	Licensees can attend live briefing sessions throughout the year, ask the analysts questions on general interest topics, and recommend topics for future briefings.

Customer Success Plus Program—offered in connection with both Support plans

The Customer Success Plus Program offers all the benefits of the chosen base support plan (Essential or Premium), plus the following:

Feature	Description
Special Events Support	Licensees get Support for all severity levels for one weekend a year. This can be an advantage when applying patches, planning application upgrades, or other important company/information technology events.
Assigned Customer Success Manager	An assigned Customer Success Manager can help resolve issues through coordination of the following activities: access to senior-level Support and development analysts, update planning assistance, scorecard activity reports, and the early adopter program.
Access to senior-level Support and development analysts	Where appropriate, the Customer Success Manager will coordinate meetings with senior Support and development resources to help resolve urgent issues.
One-on-one instruction	One-on-one instruction can help maximize the utilization of Infor resources, people, and tools.
Update planning assistance	Licensees can work with Infor Support to help plan service pack and update installations. The Customer Success Manager can discuss plans, any known issues, and other Support considerations.
Discussion on basic data usage	Data usage review can help to find ways to increase usage and realize additional value from the system.
Response Targets*	**Infor will make commercially reasonable efforts to respond, based on the following targets:**
Severity 1	Within fifteen (15) minutes for Infrastructure Incidents, and within thirty (30) minutes for Application Incidents (24x7)
Severity 2	Within one (1) hour for Infrastructure Incidents (24x7), and within one (1) business hour for Application Incidents during scheduled coverage hours
Severity 3	Within one (1) business hour during scheduled coverage hours
Severity 4	Within two (2) business hours during scheduled coverage hours
Severity 5	There is no set response target for Severity 5 (Minor issue or enhancements) If you do not see the Severity 5 option available, this means your Software utilizes the enhancement request system to enter enhancements requests. You can locate the enhancement request system via ers.infor.com/Ers/Login.aspx.
Scorecard Activity Reports	Licensees can receive regular reports detailing Support activity; the Customer Success Manager will analyze the report and make recommendations.
Early Adopter Programs	Licensees can obtain insight into planned products and Software enhancements, as well as the opportunity to participate in Beta or Early Adopter Programs.
Recommendations for relevant Infor events and opportunities	Recommendations can help make Licensees aware of the selective events and options available to Infor Customer Success Plus program members.
Infor Education Incentives	A discount is available for the Infor Campus Card.

* The response time may vary for some Infor Component Systems. Please contact your local Infor Support Center or refer to your contract with Infor.

Guidelines for optimal support for on-premises

Provided a Licensee's agreement(s) with Infor permit such actions, Infor recommends a Licensee implement the following guidelines for production, permitted test, and fallback systems. These guidelines are designed to help a Licensee's Software users enjoy a more stable working environment and receive a more optimal quality of Support from Infor. For avoidance of doubt, unless otherwise noted, these recommended guidelines are not Infor requirements.

Remote access: A Licensee can help facilitate Incident resolution by providing Infor Support analysts remote access to the licensed Software. The Support analyst will require the same clearance level as the Licensee's internal staff, however, Infor will ask for the Licensee's permission prior to connecting to the Licensee's system. The Licensee will also be expected to participate while remote access is available to the Infor Support analyst.

System administration: To maintain a solid-functioning system, a Licensee must have strong internal system administration and management to help protect the integrity of the Licensee's data. This includes, but is not limited to, he following:

- Routine system backups
- Periodic checking of the quality of the backups
- Documented system management procedures to help protect information in the event of an error or malfunction of the Software
- Change-control process to help track changes to the base Software
  - This must start during the implementation, and must be active for every subsequent change
  - The change control process must cover the operating system database and Software environments

Note: A Licensee's failure to operationalize appropriate procedures, like those set forth above, or a Licensee's lack of successful execution of such procedures, may adversely affect Infor's ability to respond to Support Incidents efficiently.

Stay current with Software updates, enhancements, and modifications: It is a suggested practice to stay current on the latest version of the Software and the most current fix levels. This can help a Licensee receive the most efficient Support from Infor.

Product expertise: A Licensee should ensure its users have been appropriately trained on the Software and on working with Infor Support staff. This can result in more productive and effective interactions. The Infor Services organization can provide assistance in this area through its consulting and training offerings.

Maintain current backup of the Software: A Licensee should maintain a current backup of all Component Systems and data to assist in expedient recovery in the event of Component System failure.

Test environment: A stand-alone or separate licensed test environment can help minimize the risk to a production operation. Within the test environment, a Licensee can test resolutions, upgrade releases, isolate specific issues found in the production environment, and test backup strategies.

Space management and performance tuning: Performance and disk space availability normally degrade over time with any system production environment. It is a Licensee's responsibility to continuously monitor these issues so that sudden performance or space issues do not quickly escalate into system downtimes.

Appendix

This section identifies, at a high level, what changes have been made to this document from its previous Version 4.4:

1. Addition of several "Definitions"

2. Updated references from "Infor Support Portal" to "Infor Concierge," which will soon become the primary entry point for Support Incidents and related content, as well as the one point of access for Infor customers; you can begin using Infor Concierge today by logging into concierge.infor.com and using your existing Infor Support Portal credentials

3. Updated references to the Infor Support Plan previously called "Infor Elite Support" to the new "Customer Success Plus" program, and outlined additional features of this program (prior Infor Elite Support customers have been transitioned to this new offering)

4. Updated Support severity level definitions and response targets

5. Updated policy for customers to close incidents, unless mutually agreed that Infor may close

6. Added references to the "Subscription Services Guide" for additional details relevant to subscription customers

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End of Proposal

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