



Statement of Work **Tyler Cashiering/Eden** **Implementation**

For City of Manhattan Beach, CA
Date 09/08/2014

1100 Oakesdale Ave SW
Renton, WA 98057
P 800-328-0310
F 425-254-1402
tylertech.com

For more information, visit www.tylertech.com

TABLE OF CONTENTS

SECTION 1 EXECUTIVE SUMMARY 2

SECTION 2 SCOPE OF IMPLEMENTATION..... 3

 Software 3

 Services 3

 Estimated Travel Expenses..... 3

 Tyler Implementation Work Breakdown Structure (WBS) 4

 Core Project Team Roles and Responsibilities 6

 Tyler Resources 6

 Manhattan Beach Resources 6

 Implementation Methodology, Staffing, and Work Plan 8

 The Implementation Methodology 8

 Sample Project Task List..... 9

SECTION 3 PROJECT ASSUMPTIONS 10

 Project Assumptions 10

 General Project Activities and Deliverables 10

 Project Planning and Kickoff 10

 System Administration, Database Setup, and Tyler Cashiering Database Setup..... 10

 Tyler Cashiering and Hardware 10

SECTION 4 SCOPE CHANGE 11

 Request for Services 11

 Application Changes..... 11

Section 1 Executive Summary

The goal of the project is successful implementation of the Tyler Cashiering system at the City of Manhattan Beach with Tyler Technologies and is the result of a number of factors related to a collaborative approach of doing business, which includes:

- Setting realistic expectations and meeting them
- Understanding the roles and responsibilities of Manhattan Beach and Tyler
- Allotting proper time for planning, training, and testing
- Determining proper allocation of resources on the part of both parties
- Fostering teamwork, communication, and effective change management

Section 2 Scope of Implementation

Tyler, in partnership with the City of Manhattan Beach, will place into production Tyler Cashiering and is limited to the following modules and services.

Software

The modules to be implemented at The City of Manhattan Beach are:

- Tyler Cashiering

Services

- Tyler Project Planning Services
- Tyler Implementation Services

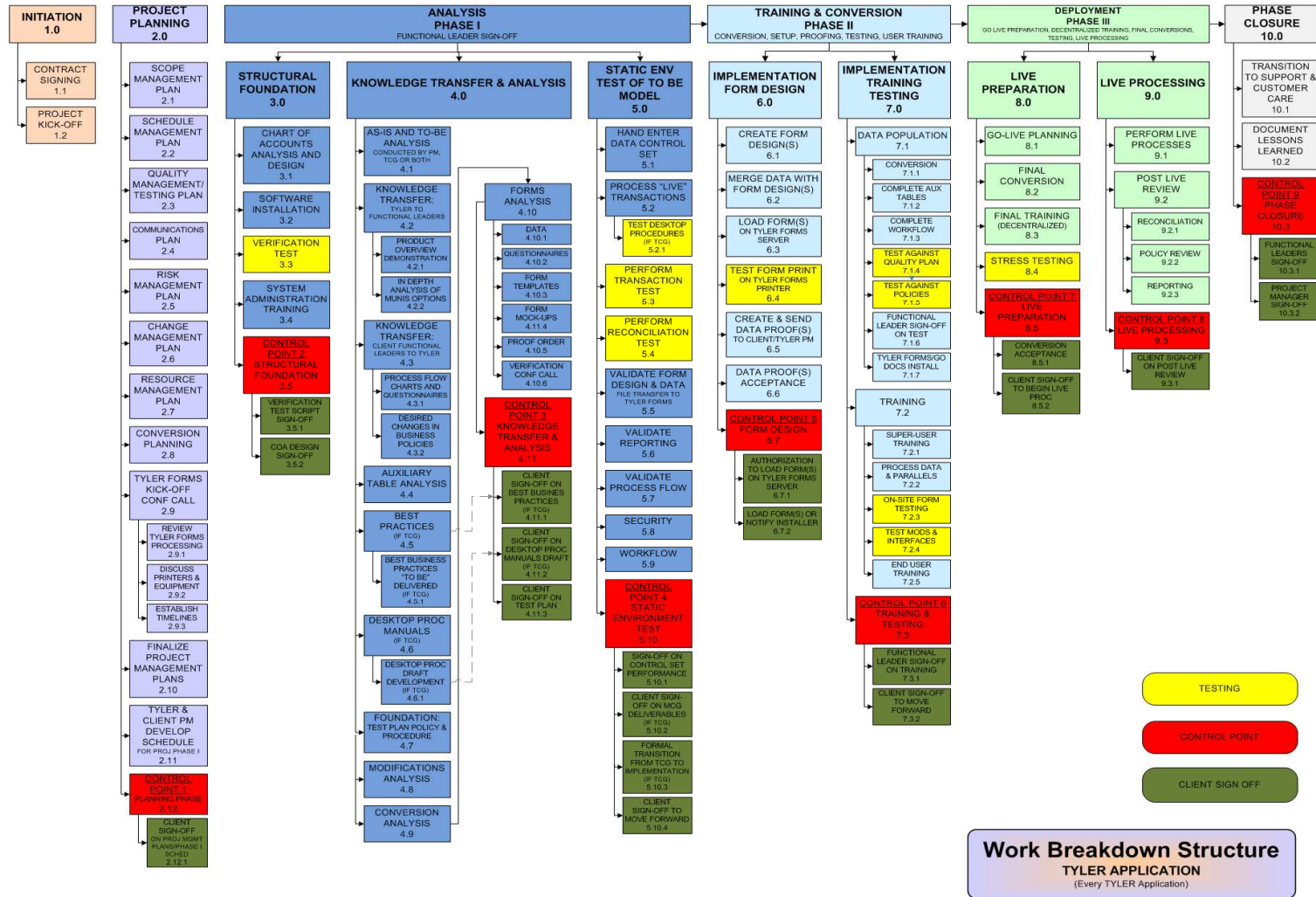
Estimated Travel Expenses

Based on the proposed project plan, we anticipate approximately 4 days. Travel expenses are in addition to implementation and consulting fees and will be billed as incurred according to Tyler's current travel policy.

Tyler Implementation Work Breakdown Structure (WBS)

The WBS on the following page breaks down all of the major tasks involved in the implementation of the ERP system.

City of Manhattan Beach
Statement of Work for Personnel System Implementation



Core Project Team Roles and Responsibilities

Tyler Resources

Some Tyler Resources may hold multiple project roles. For example, the Tyler Functional PM role may be held by the Tyler PM or Tyler Consultant for the project.

Tyler Project Manager

- Schedule and lead the Kick-Off Meeting.
- Oversee project and monitor progress with Client PM.
- Hold regular conference calls with Client PM to review status and progress of project and to identify any outstanding issues.
- Manage Change Orders.
- Initiate Change Requests to project management plans as requested by Client.
- Provide regular Status Reports to Client project management.

Tyler Implementation Consultants – Product Specialists, Trainers

- Deliver Knowledge Transfer Analysis.
- Perform System Design
- Assist in Testing
- Provide Super-User Training.
- Provide go-live support.

Tyler Installation Team – Technical Specialists

- Install software as specified in contract.

Tyler Technical Support – Product Specialists

- Provide timely response to questions and issues based on call priorities.
- Escalate issues to Senior Analysts and Development as needed.
- Seek Client confirmation of issue resolution.

Manhattan Beach Resources

The individuals involved in the project, along with their assigned role(s) will be identified during project planning for further clarification of responsibilities.

Client Project Manager

- Work directly with Tyler Project Manager.
- Attend project status meetings.
- Oversee all Manhattan Beach core team members.

- Manage completion of Project Planning Documents.
- Identify and communicate to Tyler PM requirements for a successful implementation of Eden.
- Coordinate with Tyler PM to develop and maintain implementation schedule, which identifies specific milestones and establishes accountability.
- Scheduling Client resources for training days. This includes but is not limited to personnel, equipment, and training rooms
- Identify additional employee training needs and update the schedule.
- Ensure that employees accomplish tasks on time, including monitoring homework assignments.
- Review invoices and approve payment in accordance with the contract and associated milestones.
- Oversee Project and monitor progress with Tyler PM.
- Coordinate MIS functions such as system backups, loading releases and software updates, hardware installation, and operating system setup.
- Coordinate regular internal project meetings to determine status of tasks and list outstanding issues. Communicate these to the Tyler PM at each project management meeting.
- Initiate Change Requests to project management plans as required.

Functional Leader – Support Specialist

- Provide detailed policy information.
- Analyze potential policy changes.
- Are the subject matter experts on selected modules.
- Participate in knowledge transfer and analysis sessions.
- Participate in testing
- Assign department resources for training and internal project tasks.
- Complete system setup and application configuration.
- Attend all training sessions or appoint an appropriate management level designee.
- Assess end-user competency on trained topics.
- Assess policy compliance.
- Provide end users with dedicated time to complete required homework tasks.
- Act as supervisor and change coach for the new processes.
- Identify and communicate to Client PM any additional training needs or scheduling conflicts.
- Perform Live Processes.

Implementation Methodology, Staffing, and Work Plan

The Implementation Methodology

Tyler uses a Work Breakdown Structure (WBS) to organize and manage its software implementation projects. This ensures that all critical tasks are planned, scheduled, and executed, resulting in a successful implementation. Tasks are organized throughout each project phase to ensure that project Initiation, Planning, Execution, Controlling, and Closure are accomplished, per the standards set by the Project Management Institute (PMI).

The Tyler Project Manager will provide a detailed project plan and schedule specific to the project tasks for Manhattan Beach during the planning portion of the project. Using Microsoft Project and other tools, the Tyler PM will maintain the project task list and distribute updates through the duration of the project. An example of the WBS can be found in the Project Roles and Responsibilities section of this document.

The Project plan below represents an example of the format and detail of the planning deliverable which will be developed and maintained by the Tyler Project Manager. The dates and duration of this plan are hypothetical and have not made consideration of staff availability, customer-imposed “black out” time periods, etc. During the initiation and planning stages of the project, the Tyler and Manhattan Beach Project Managers will collaborate to review the detail task requirement, identify staff resources and confirm their availability, and finalize the actual implementation plan and schedule to be pursued.

Sample Project Task List

Session / Task	Approx. Time	Client Resources	Tyler Lead Role	Client Lead Role
Order & Deliver Cashiering Hardware	2 weeks	Project Manager	<ul style="list-style-type: none"> Collect hardware preferences. Place hardware order to Core Technologies. 	<ul style="list-style-type: none"> Provide hardware preference information. Review packing list upon delivery. Notify EDEN of hardware delivery.
Cashiering Consult	4 hours	Project Manager IT Cashiering users	<ul style="list-style-type: none"> Provide agenda. Gather data for setup. Provide "Follow-Up Memo" detailing accomplishments and homework. 	<ul style="list-style-type: none"> Complete "Cashiering Questionnaire." Make setup decisions.
Cashiering Database Setup	4 hours	IT	<ul style="list-style-type: none"> Setup Cashiering database. 	<ul style="list-style-type: none"> Be available for questions.
Cashiering Setup, Ops & Go Live	4 days	Project Manager IT Cashiering users	<ul style="list-style-type: none"> Provide agenda. Provide initial system preference setup. Train on module configuration. Train on Cashiering functionality. Provide on-site support for live operations. Provide "Follow-Up Memo" detailing accomplishments and homework. 	<ul style="list-style-type: none"> Complete Client-specific configuration such as Cashiering transaction types. Complete homework items detailed in the "Follow-Up Memo." Begin live operations.

Section 3 Project Assumptions

Project Assumptions

The product will provide functionality as represented in the Functional Requirements section(s) of the Proposal and based upon demonstrations, discovery, and the development of the SOW.

Implementation services will be provided as described in this “Statement of Work.”

General Project Activities and Deliverables

Project Planning and Kickoff

The following outlines major assumptions and activities surrounding the Project Initiation and Kickoff phase of the Project:

- Manhattan Beach will assign and authorize a Project Manager prior to the start of this phase.
- Manhattan Beach Project Manager, along with the Tyler Project Manager, will participate in the review and final revision of the Project management and planning documents, which include the Project Scope Agreement, Communications Plan, and Risk Management Plan.
- The Tyler Project Manager and Client Project Manager will complete development of the Project Plan.
- Manhattan Beach project staff will participate with the Tyler Project Manager in the Project Kickoff meeting to discuss the project approach and expectations.

System Administration, Database Setup, and Tyler Cashiering Database Setup

The following list outlines major assumptions and activities surrounding the System Administration implementation phase of the Project:

- Tyler will advise the Client on Eden security and user setup features—for example, user setup, user and group security, field security, and so on.
- The Client shall define and set up menu and end-user security options.
- The Client, through data testing, will approve the functional configuration options and setup.

Tyler Cashiering and Hardware

The following list outlines major assumptions and activities surrounding the Tyler Cashiering implementation phase of the Project:

- The Client will not plug in the cashiering hardware prior to training; to do so will void all manufacture’s warranties and product support.
- Tyler will install the Cashiering hardware during the Cashiering implementation.
- Tyler will assist the Client in the selection and definition of Cashiering functional configuration options.
- The Client, with Tyler support, is responsible for the testing of configuration options.
- The Client, through data testing, will approve the functional configuration options and setup.
- Tyler does not convert Cashiering information.
- No Cashiering functional modifications are included within the Eden Project scope.

Section 4 Scope Change

Request for Services

This “State of Work” document outlines the services that Tyler will provide Manhattan Beach. If Manhattan Beach would like Tyler to perform additional services, a Request for Services (RFS) can be submitted to the Tyler Project Manager. The RFS defines the scope of the requested task and will be used to estimate the associated cost to Manhattan Beach.

Application Changes

Manhattan Beach is responsible for identifying change as early as possible. Once the Project Plan is set for the module, application changes should be made after the module is in Live production. Manhattan Beach is responsible for any training and conversion services that result from an application change.

If Manhattan Beach would like Tyler to make modifications to the software, a formal request for change through a Request for Services (RFS) can be submitted to the Tyler Project Manager. Tyler will review the RFS and provide Manhattan Beach with a scope and cost estimate to authorize the change, if it can be made. If Manhattan Beach is interested in funding the application change, the request will go to the Tyler Program Management department where a Tyler Business Analyst will create a formal scope and cost Business Requirements Document (BRD) to be signed by Manhattan Beach. After signing off on the BRD, Tyler will add the service to the Development Schedule and invoice any fees in accordance to the BRD.