



CITY MANAGER'S OFFICE

DOCUMENT ROUTING FORM

Rev: 7 | Revision Date: 04/02/2025

RUSH Director of Finance needs
Services to assist with projects

1L

CITY MANAGER AND/OR MAYOR'S REVIEW AND SIGNATURE REQUEST COVERSHEET

1) ORIGINATING OFFICES (Charter/Department):

Routing Start Date: 4/16/2025

☒ Agenda Item ☐ Non-Agenda

Charter Ofc: _____ Router Name: _____ Ext: _____

Department: FIN-Procurement Router Name: Matthew Eaton Ext: 5141

Commission Mtg. Date: 4/15/2025 CAM #: 25-03 97 Item #: CP-1

Document Title:

Agreement for Infor CloudSuite Managed Services (RFP 380; Arisma Group, LLC d/b/a Cendien)

CAM attached: ☒ Yes ☐ No Action Summary attached: ☒ Yes ☐ No CIP FUNDED: ☐ YES ☒ NO

Capital Investment / Community Improvement Project defined as having a life of at least 10 years and a cost of at least \$50,000 and shall mean improvements to real property (land, buildings, or fixtures) that add value and/or extend useful life, including major repairs such as roof replacement, etc. Term "real property" include land, real estate, realty or real.

2) CITY ATTORNEY OFFICE (CAO): Documents to be signed/routed? ☒ Yes ☐ No

Is the attached Granicus document Final? ☒ Yes ☐ No Number of originals attached: 1

Attorney's Name: Eric W. Abend Dubois Spence Approved as to Form: ☒ Yes ☐ No Initials: [Signature]

Continue Routing To: FIN (if applicable) Date: _____ and then to CCO Date: 4/17/25

3) CITY CLERK OFFICE (CCO): Clerk Initials: 1 # of originals: WAY

Routed to Dept/Charter Ofc.: _____ Date: 04/17/25

4) CITY MANAGER OFFICE (CMO): Received From: _____ Date: 4/18 CMO LOG #: Apr 16

TO ACM/AcACM: ☒ S. Grant ☐ A. Fajardo ☐ B. Rogers ☐ C. Cooper ☐ L. Reece Date: 4/18/25

Comments/Questions

ACM/AcACM Initials: [Signature] for continuous routing to Manager/Executive Director Rickelle Williams.

CMO Log Out & Forward to CCO, Date: _____, for continuous routing to the Mayor.

5) MAYOR/CRA CHAIRMAN: Date Received: _____ Date to CCO: _____

Please sign as indicated and forward the originals to the City Clerk's Office for a final processing and review of attestation and/or seal, if applicable.

6) INSTRUCTIONS TO CITY CLERK'S OFFICE: Please retain a scan record copy and forward originals to:

Dept.: FIN-Procurement *Name: Matthew Eaton Contact # 954-828-5141

*Please scan the record copy to the City Clerk once review and sign at the last level of government (Federal, State, County) is complete.

Scan Date: _____ Attach certified Resolution # _____ ☐ Yes ☐ No Original form route to CAO



CITY OF FORT LAUDERDALE
City Commission Agenda Memo
REGULAR MEETING

#25-0377

TO: Honorable Mayor & Members of the
Fort Lauderdale City Commission

FROM: Rickelle Williams, City Manager

DATE: April 15, 2025

TITLE: Motion Approving Agreement for Infor CloudSuite Managed Services and Professional Services with Arisma Group, LLC d/b/a Cendien - \$535,000 - (Commission Districts 1, 2, 3 and 4)

Recommendation

Staff recommends the City Commission approve an Agreement, in substantially the form attached, for Infor CloudSuite Managed Services and Professional Services with Arisma Group, LLC d/b/a Cendien (Cendien), for an initial two (2)-year contract term in the amount of \$535,000; and authorize the City Manager to execute said agreement, and approve two (2) additional one year renewal options for an estimated annual renewal amount of \$200,000 for a potential total contract amount of \$935,000, contingent upon appropriation of funds.

Background

The City of Fort Lauderdale successfully launched its Enterprise Resource Planning (ERP) system, a software provided by Infor (US), Inc., on October 3, 2022. The City currently operates the Infor CloudSuite, featuring customized modules for Financial Management (FSM), Supply Chain Management (SCM), and Human Capital Management (HCM).

The Information Technology Services Department initiated a Request for Proposal (RFP) to engage a highly experienced managed services provider with specialized expertise in Infor solutions to address challenges related to system stability, performance, and process optimization that have emerged since the launch.

The selected partner will deliver comprehensive application support for various Infor CloudSuite modules, including FSM, SCM, HCM, BIRST (Infor Business Intelligence platform) analytics, and reporting. These professional services will encompass key functions such as: absence management; benefits administration; performance management; general ledger; accounts payable; and procurement. Additionally, the Finance Department will utilize this professional services contract to implement the Special Assessment Module, as well as enhance and optimize the Accounts Receivable, Grant Management, and Bank Reconciliation Modules.

On October 30, 2024, the Procurement Services Division issued RFP No. 380 for Infor CloudSuite Managed Services. On November 21, 2024, a total of three (3) proposals were received along with one no response and another late response, respectively. Proposals were submitted from the following companies.

1. Arisma Group, LLC d/b/a Cendien
2. Rubensky LLC d/b/a CyberGarde by Ruben Calixte (CyberGarde)
3. RPI Consultants, LLC (RPI)

On January 24, 2025, the RFP Evaluation Committee (EC) met to evaluate and rank the proposals based on the following criteria.

| | |
|---|-------------|
| Demonstrates understanding, project approach, and overall ability to meet and/or exceed the requirements. | 35% |
| Credentials, related experience, references and financial stability of the firm as well as the related experience of key personnel to be assigned | 25% |
| Overall quality and completeness of proposal | 10% |
| Total Project Cost | 30% |
| TOTAL PERCENT AVAILABLE: | 100% |

The top two (2) ranked firms (in alphabetical order), were shortlisted to give presentations and scored based on the above criteria.

1. Cendien
2. RPI

On February 10, 2025, the EC met for presentations and discussions with both shortlisted firms.

On March 4, 2025, the EC convened, scored, and confirmed the final rankings. It ranked Arisma Group, LLC d/b/a Cendien as the highest ranked, responsive, and responsible firm.

On March 14, 2025, negotiations commenced with Cendien.

On March 17, 2025, Cendien agreed to favorable pricing, terms, and conditions as noted on the Negotiated Term Sheet (Exhibit 5).

As a result, staff recommends the Commission to award Cendien a two (2)-year contract with two (2) additional one (1)-year renewal options for Infor CloudSuite Managed Services and Professional Services.

Resource Impact

There will be a FY 2025 fiscal impact to the City in the amount of \$304,330 for this agreement. Funding for ERP professional services, was approved by the Commission with the April 1, 2025, Budget Amendment (CAM 25-0093). Funds for this agreement in the amount of \$304,330 are available in the FY 2025 Budget in the account(s) listed below. Funding for future years is contingent upon the approval and allocation of the annual budget.

| Funds available as of April 2, 2025 | | | | | |
|--|--|--|---|--|------------------|
| ACCOUNT NUMBER | COST CENTER NAME (Program) | CHARACTER/ ACCOUNT NAME | AMENDED BUDGET (Character) | AVAILABLE BALANCE (Character) | AMOUNT |
| 10-001-9003-519- 30-3199 | Other General Government – Leases, Taxes, Pensions | Services/ Materials / Other Professional Services | \$800,684 | \$351,914 | \$100,000 |
| 10-001-2020-513- 30-3199 | Treasury Accounts Receivable | Services/ Materials/ Other Professional Services | \$569,136 | \$267,680 | \$135,900 |
| 10-001-2001-513- 30-3199 | Finance Administration | Services/ Materials/ Other Professional Services | \$285,462 | \$82,379 | \$68,330 |
| TOTAL AMOUNT ► | | | | | \$304,330 |

Strategic Connections

This item supports the *Press Play Fort Lauderdale 2029* Strategic Plan, specifically advancing:

- The Guiding Principles: Technology Adaptation.

This item advances the *Fast Forward Fort Lauderdale 2035* Vision Plan: We Are Ready.

Attachments

Exhibit 1 - Solicitation
Exhibit 2 - Final Ranking
Exhibit 3 - CyberGard Proposal
Exhibit 4 - RPI Proposal
Exhibit 5 - Cendien Negotiated Term Sheet
Exhibit 6 - Cendien Proposal
Exhibit 7 - CoFL - Cendien Agreement

Prepared by: Glenn Marcos, Chief Procurement Officer, Finance
Shermor Gaillard, Senior Technology Strategist, Information Technology
Laurie Platkin, Senior Procurement Specialist, Finance
Matthew Eaton, Senior Administrative Assistant, Finance

Department Directors: Tamecka McKay, Information Technology
Linda Short, Finance

details

File #: 250377 Version: 1

Type: CONSENT PURCHASE

Title: Motion Approving Agreement for Infor CloudSuite Managed Services and Professional Services with Arisma Group, LLC d/b/a Cendien - \$535,000 - (Commission Districts 1, 2, 3 and 4)

Mover: Ben Sorensen Second: Pam Beasley-Pittman

Result: Pass

Agenda note:

Minutes note:

Action: **APPROVED**

Action text: APPROVED

consent votes (5:0)

5 records

Group

Export

| Person Name | Vote |
|----------------------------|------|
| <u>John C. Herbst</u> | Yea |
| <u>Steven Glassman</u> | Yea |
| <u>Pam Beasley-Pittman</u> | Yea |
| <u>Ben Sorensen</u> | Yea |
| <u>Dean J. Trantalis</u> | Yea |



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Foreign Limited Liability Company
ARISMA GROUP, LLC

Filing Information

Document Number M23000011353
FEI/EIN Number 20-2859158
Date Filed 09/01/2023
State TX
Status ACTIVE

Principal Address

1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Mailing Address

1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Registered Agent Name & Address

VALDES DENIS, RAMON
656 SOUTH DRIVE
MIAMI SPRINGS, FL 33166

Authorized Person(s) Detail

Name & Address

Title MGR

DENIS, ISRAEL

1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Title MBR

DENIS, LIDIA

1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Title MBR

ISRAEL DENIS, DOMINGO
1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Annual Reports

| Report Year | Filed Date |
|-------------|------------|
| 2024 | 04/29/2024 |
| 2025 | 03/11/2025 |

Document Images

| | |
|---|--|
| 03/11/2025 -- ANNUAL REPORT | View image in PDF format |
| 04/29/2024 -- ANNUAL REPORT | View image in PDF format |
| 09/01/2023 -- Foreign Limited | View image in PDF format |

Florida Department of State, Division of Corporations

AGREEMENT FOR INFOR CLOUDSUITE MANAGED SERVICES

THIS AGREEMENT for Infor CloudSuite Managed Services ("Agreement"), made this 28 day of April 2025, is by and between the City of Fort Lauderdale, a Florida municipality ("City"), whose address is 101 NE 3rd Avenue, Suite 2100, Fort Lauderdale, Florida 33301-1016, and Arisma Group, LLC d/b/a Cendien, a Texas company authorized to conduct business in the State of Florida ("Contractor" or "Company"), whose principal address is 1846 East Rosemeade Parkway, Suite 200, Carrollton, Texas 75007, Phone: 214-245-4580, Email: idenis@cendien.com; (collectively, "Parties").

NOW THEREFORE, for and in consideration of the mutual promises and covenants set forth herein and other good and valuable consideration, Contractor agrees to provide Infor Cloudsuite Managed Services, as is more particularly described in Request for Proposals ("RFP") Event No. 380 and Contractor's response to RFP (the "Work"), and the City and the Contractor covenant and agree as follows:

WITNESSETH:

I. DOCUMENTS

The following documents (collectively "Contract Documents") are hereby incorporated into and made part of this Agreement:

- (1) RFP Event No. 380 - Infor CloudSuite Managed Services, including any and all exhibits and addenda prepared by the City of Fort Lauderdale ("RFP" or "Exhibit A").
- (2) The Contractor's Competitive Negotiation Term Sheet, dated March 21, 2025 ("Exhibit B").
- (3) The Contractor's response to the RFP, dated November 21, 2024 ("Exhibit C").

All Contract Documents may also be collectively referred to as the "Documents." In the event of any conflict between or among the Documents or any ambiguity or missing specifications or instruction, the following priority is established:

- A. First, this Agreement dated 4/28, 2025.
- B. Second, Exhibit A.
- C. Third, Exhibit B.
- D. Fourth, Exhibit C.

II. SCOPE

The Contractor shall perform the Work under the general direction of the City as set forth in the Contract Documents.

Unless otherwise specified herein, the Contractor shall perform all Work identified in this Agreement. The Parties agree that the scope of services is a description of Contractor's obligations and responsibilities, and is deemed to include preliminary considerations and prerequisites, and all labor, materials, equipment, and tasks which are such an inseparable part of the work described that exclusion would render performance by Contractor impractical, illogical, or unconscionable.

Contractor acknowledges and agrees that the City's Contract Administrator has no authority to make changes that would increase, decrease, or otherwise modify the Scope of Services to be provided under this Agreement. Any change orders to the Scope of Services or amendments to the Contract Documents must be authorized by the City Manager, or his designee, and approved by the City Commission whenever required in compliance with the Charter and Code of Ordinances for the City of Fort Lauderdale.

By signing this Agreement, the Contractor represents that it has thoroughly reviewed the documents incorporated into this Agreement by reference and that it accepts the description of the work and the conditions under which the Work is to be performed.

III. TERM OF AGREEMENT

The initial term of this Agreement shall commence on **April 15, 2025**, and shall end on **April 14, 2027**. **The City reserves the right to extend this Agreement for two (2) additional one (1)-year terms**, provided all terms, conditions and specifications contained herein remain the same, and the extension is mutually agreed to in writing and signed by both Parties. In the event the term of this Agreement extends beyond the end of any fiscal year of City, to wit, September 30th, the continuation of this Agreement beyond the end of the City's fiscal year shall be subject to and conditioned upon both the appropriation and the availability of funds.

IV. COMPENSATION

The Contractor agrees to provide the services and/or materials as specified in the Contract Documents at the cost specified in Exhibit B. It is acknowledged and agreed by Contractor that this amount is the maximum payable and constitutes a limitation upon City's obligation to compensate Contractor for Contractor's services related to this Agreement. This maximum amount, however, does not constitute a limitation of any sort upon Contractor's obligation to perform all items of work required by or which can be reasonably inferred from the Scope of Services. Except as otherwise provided in the solicitation, no amount shall be paid to Contractor to reimburse Contractor's expenses.

V. METHOD OF BILLING AND PAYMENT

Contractor may submit proper invoices for compensation no more often than monthly, but only after the services for which the invoices are submitted have been completed. An original invoice plus one copy are due within fifteen (15) days of the end of the month. Invoices shall designate the nature of the services performed and/or the goods provided.

City shall pay Contractor within forty-five (45) days of receipt of Contractor's proper invoice, as provided in the Florida Local Government Prompt Payment Act, as may be amended or revised.

To be deemed proper, all invoices must comply with the requirements set forth in this Agreement and must be submitted on the form and pursuant to instructions prescribed by the City's Contract Administrator. Payment may be withheld for failure of Contractor to comply with a term, condition, or requirement of this Agreement.

Notwithstanding any provision of this Agreement to the contrary, City may withhold, in whole or in part, payment to the extent necessary to protect itself from loss on account of inadequate or defective work that has not been remedied or resolved in a manner satisfactory to the City's Contract Administrator or failure to comply with this Agreement. The amount withheld shall not be subject to payment of interest by City.

VI. GENERAL CONDITIONS

A. Indemnification

Contractor shall protect and defend at Contractor's expense, counsel being subject to the City's approval, and indemnify and hold harmless the City and the City's officers, employees, volunteers, and agents from and against any and all losses, penalties, fines, damages, settlements, judgments, claims, costs, charges, expenses, or liabilities, including any award of attorney fees and any award of costs, in connection with or arising directly or indirectly out of any act or omission by the Contractor or by any officer, employee, agent, invitee, subcontractor, or sublicensee of the Contractor. The provisions and obligations of this section shall survive the expiration or earlier termination of this Agreement. To the extent considered necessary by the City Manager, any sums due Contractor under this Agreement may be retained by City until all of City's claims for indemnification pursuant to this Agreement have been settled or otherwise resolved, and any amount withheld shall not be subject to payment of interest by City.

B. Intellectual Property

Contractor shall protect and defend at Contractor's expense, counsel being subject to the City's approval, and indemnify and hold harmless the City from and against any and all losses, penalties, fines, damages, settlements, judgments, claims, costs, charges, royalties, expenses, or liabilities, including any award of attorney fees and any award of costs, in connection with or arising directly or indirectly out of any infringement or allegation of infringement of any patent, copyright, or other intellectual property right in connection with the Contractor's or the City's use of any copyrighted, patented or un-patented invention, process, article, material, or device that is manufactured, provided, or used pursuant to this Agreement. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the Work.

C. Termination for Cause

The City may terminate this Agreement for cause if the Contractor has not corrected the breach within ten (10) days after written notice from the City identifying the breach. The City Manager may also terminate this Agreement upon such notice as the City Manager deems appropriate under the circumstances in the event the City Manager determines that termination is necessary to protect the public health or safety. The Parties agree that if the City erroneously, improperly, or unjustifiably terminates for cause, such termination shall be deemed a termination for convenience, which shall be effective thirty (30) days after such notice of termination for cause is provided.

This Agreement may be terminated for cause for reasons including, but not limited to, Contractor's repeated (whether negligent or intentional) submission for payment of false or incorrect bills or invoices, failure to perform the Work to the City's satisfaction; or failure to continuously perform the Work in a manner calculated to meet or accomplish the objectives as set forth in this Agreement.

D. Termination for Convenience

The City reserves the right, in its best interest as determined by the City, to cancel this Agreement for convenience by giving written notice to the Contractor at least thirty (30) days prior to the effective date of such cancellation. In the event this Agreement is terminated for convenience, Contractor shall be paid for any services performed to the City's satisfaction pursuant to the Agreement through the termination date specified in the written notice of termination. Contractor acknowledges and agrees that it has received good, valuable, and sufficient consideration from City, the receipt and adequacy of which are hereby acknowledged by Contractor, for City's right to terminate this Agreement for convenience.

E. Cancellation for Unappropriated Funds

The City reserves the right, in its best interest as determined by the City, to cancel this Agreement for unappropriated funds or unavailability of funds by giving written notice to the Contractor at least thirty (30) days prior to the effective date of such cancellation. The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the Agreement into a subsequent fiscal period is subject to appropriation of funds, unless otherwise provided by law.

F. Insurance

As a condition precedent to the effectiveness of this Agreement, during the term of this Agreement and during any renewal or extension term of this Agreement, the Contractor, at the Contractor's sole expense, shall provide insurance of such types and with such terms and limits as noted below. Providing proof of and maintaining adequate insurance coverage are material obligations of the Contractor. The Contractor shall provide the City a certificate of insurance evidencing such coverage. The Contractor's insurance coverage shall be primary insurance for all applicable policies. The limits of coverage under each

policy maintained by the Contractor shall not be interpreted as limiting the Contractor's liability and obligations under this Agreement. All insurance policies shall be from insurers authorized to write insurance policies in the State of Florida and that possess an A.M. Best rating of A-, VII or better. All insurance policies are subject to approval by the City's Risk Manager.

The coverages, limits, and endorsements required herein protect the interests of the City, and these coverages, limits, and endorsements may not be relied upon by the Contractor for assessing the extent or determining appropriate types and limits of coverage to protect the Contractor against any loss exposure, whether as a result of this Agreement or otherwise. The requirements contained herein, as well as the City's review or acknowledgement, are not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by the Contractor under this Agreement.

The following insurance policies and coverages are required:

Professional Liability/Errors & Omissions

Coverage must be afforded for Wrongful Acts in an amount not less than \$1,000,000 each claim and \$2,000,000 aggregate.

Contractor must keep the professional liability insurance in force until the third anniversary of expiration or early termination of this Agreement or the third anniversary of acceptance of work by the City, whichever is longer, which obligation shall survive expiration or early termination of this Agreement.

Commercial General Liability

Coverage must be afforded under a Commercial General Liability policy with limits not less than:

- \$1,000,000 each occurrence and \$2,000,000 aggregate for Bodily Injury, Property Damage, and Personal and Advertising Injury
- \$1,000,000 each occurrence and \$2,000,000 aggregate for Products and Completed Operations

Policy must include coverage for contractual liability and independent contractors.

The City, a Florida municipality, its officials, employees, and volunteers are to be included as an additional insured with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liability arising out of activities performed by or on behalf of Contractor. The coverage shall contain no special limitation on the scope of protection afforded to the City, its officials, employees, and volunteers.

Insurance Certificate Requirements

- a. Contractor shall provide the City with valid Certificates of Insurance (binders are unacceptable) no later than thirty (30) days prior to the start of work contemplated in this Agreement.
- b. Contractor shall provide to the City a Certificate of Insurance having a

thirty (30) day notice of cancellation; ten (10) days' notice if cancellation is for nonpayment of premium.

- c. In the event that the insurer is unable to accommodate the cancellation notice requirement, it shall be the responsibility of the Contractor to provide the proper notice. Such notification will be in writing by registered mail, return receipt requested, and addressed to the certificate holder.
- d. In the event the Agreement term goes beyond the expiration date of the insurance policy, the Contractor shall provide the City with an updated Certificate of Insurance no later than ten (10) days prior to the expiration of the insurance currently in effect. The City reserves the right to suspend the Agreement until this requirement is met.
- e. The Certificate of Insurance shall indicate whether coverage is provided under a claims-made or occurrence form. If any coverage is provided on a claims-made form, the Certificate of Insurance must show a retroactive date, which shall be the effective date of the initial contract or prior.
- f. The City shall be named as an Additional Insured on all liability policies, with the exception of Workers' Compensation.
- g. The City shall be granted a Waiver of Subrogation on the Contractor's Workers' Compensation insurance policy.
- h. The title of the Agreement, Bid/Contract number, event dates, or other identifying reference must be listed on the Certificate of Insurance.

The Certificate Holder should read as follows:

City of Fort Lauderdale
401 SE 21st Street
Fort Lauderdale, FL 33316

The Contractor has the sole responsibility for the payment of all insurance premiums and shall be fully and solely responsible for any costs or expenses as a result of a coverage deductible, co-insurance penalty, or self-insured retention; including any loss not covered because of the operation of such deductible, co- insurance penalty, self-insured retention, or coverage exclusion or limitation. Any costs for adding the City as an Additional Insured shall be at the Contractor's expense.

If the Contractor's primary insurance policy/policies do not meet the minimum requirements, as set forth in this Agreement, the Contractor may provide evidence of an Umbrella/Excess insurance policy to comply with this requirement.

The Contractor's insurance coverage shall be primary insurance as applied to the City and the City's officers, employees, and volunteers. Any insurance or self- insurance maintained by the City covering the City, the City's officers, employees, or volunteers shall be non-contributory.

Any exclusion or provision in the insurance maintained by the Contractor that excludes coverage for work contemplated in this Agreement shall be unacceptable and shall be considered breach of contract.

All required insurance policies must be maintained until the contract work has been accepted by the City, or until this Agreement is terminated, whichever is later. Any lapse in coverage shall be considered breach of contract. In

addition, Contractor must provide to the City confirmation of coverage renewal via an updated certificate should any policies expire prior to the expiration of this Agreement. The City reserves the right to review, at any time, coverage forms and limits of Contractor's insurance policies.

The Contractor shall provide notice of any and all claims, accidents, and any other occurrences associated with this Agreement shall be provided to the Contractor's insurance company or companies and the City's Risk Management office as soon as practical.

It is the Contractor's responsibility to ensure that any and all of the Contractor's independent contractors and subcontractors comply with these insurance requirements. All coverages for independent contractors and subcontractors shall be subject to all of the applicable requirements stated herein. Any and all deficiencies are the responsibility of the Contractor.

G. Environmental, Health and Safety

Contractor shall place the highest priority on health and safety and shall maintain a safe working environment during performance of the Work. Contractor shall comply, and shall secure compliance by its employees, agents, and subcontractors, with all applicable environmental, health, safety and security laws and regulations, and performance conditions in this Agreement. Compliance with such requirements shall represent the minimum standard required of Contractor. Contractor shall be responsible for examining all requirements and determine whether additional or more stringent environmental, health, safety and security provisions are required for the Work. Contractor agrees to utilize protective devices as required by applicable laws, regulations, and any industry or Contractor's health and safety plans and regulations, and to pay the costs and expenses thereof, and warrants that all such persons shall be fit and qualified to carry out the Work.

H. Standard of Care

Contractor represents that it is qualified to perform the work, that Contractor and its subcontractors possess current, valid state of Florida and/or local licenses to perform the Work, and that their services shall be performed in a manner consistent with that level of care and skill ordinarily exercised by other qualified contractors under similar circumstances.

I. Rights in Documents and Work

Any and all reports, photographs, surveys, and other data and documents provided or created in connection with this Agreement are and shall remain the property of City; and Contractor disclaims any copyright in such materials. In the event of and upon termination of this Agreement, any reports, photographs, surveys, and other data and documents prepared by Contractor, whether finished or unfinished, shall become the property of City and shall be delivered by Contractor to the City's Contract Administrator within seven (7) days of termination of this Agreement by either Party. Any compensation due

to Contractor shall be withheld until Contractor delivers all documents to the City as provided herein.

J. Audit Right and Retention of Records

City shall have the right to audit the books, records, and accounts of Contractor and Contractor's subcontractors that are related to this Agreement. Contractor shall keep, and Contractor shall cause Contractor's subcontractors to keep, such books, records, and accounts as may be necessary in order to record complete and correct entries related to this Agreement. All books, records, and accounts of Contractor and Contractor's subcontractors shall be kept in written form, or in a form capable of conversion into written form within a reasonable time, and upon request to do so, Contractor or Contractor's subcontractor, as applicable, shall make same available at no cost to City in written form.

Contractor and Contractor's subcontractors shall preserve and make available, at reasonable times for examination and audit by City in Broward County, Florida, all financial records, supporting documents, statistical records, and any other documents pertinent to this Agreement for the required retention period of the Florida public records law, Chapter 119, Florida Statutes (2024), as may be amended or revised, if applicable, or, if the Florida Public Records Act is not applicable, for a minimum period of three (3) years after termination of this Agreement. If any audit has been initiated and audit findings have not been resolved at the end of the retention period or three (3) years, whichever is longer, the books, records, and accounts shall be retained until resolution of the audit findings. If the Florida public records law is determined by City to be applicable to Contractor and Contractor's subcontractors' records, Contractor and Contractor's subcontractors shall comply with all requirements thereof; however, Contractor, and Contractor's subcontractors shall violate no confidentiality or non-disclosure requirement of either federal or state law. Any incomplete or incorrect entry in such books, records, and accounts shall be a basis for City's disallowance and recovery of any payment upon such entry.

Contractor shall, by written contract, require Contractor's subcontractors to agree to the requirements and obligations of this Section.

The Contractor shall maintain during the term of the Agreement all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this Agreement.

K. Public Entity Crime Act

Contractor represents that the execution of this Agreement will not violate the Public Entity Crime Act, Section 287.133, Florida Statutes (2024), as may be amended or revised, which essentially provides that a person or affiliate who is a contractor, consultant, or other provider and who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to City, may not submit a bid on a contract with City for the construction or repair of a public building or public work, may not submit bids on leases of real property to City,

may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under an Agreement with City, and may not transact any business with City in excess of the threshold amount provided in Section 287.017, Florida Statutes (2024), as may be amended or revised, for category two purchases for a period of 36 months from the date of being placed on the convicted vendor list. Violation of this Section shall result in termination of this Agreement and recovery of all monies paid by City pursuant to this Agreement and may result in debarment from City's competitive procurement activities.

L. Independent Contractor

Contractor is an independent contractor under this Agreement. Services provided by Contractor pursuant to this Agreement shall be subject to the supervision of the Contractor. In providing such services, neither Contractor nor Contractor's agents shall act as officers, employees, or agents of City. No partnership, joint venture, or other joint relationship is created hereby. The City does not extend to Contractor or Contractor's agents any authority of any kind to bind City in any respect whatsoever.

M. Inspection and Non-Waiver

Contractor shall permit the representatives of the City to inspect and observe the Work at all times.

The failure of the City to insist upon strict performance of any other terms of this Agreement or to exercise any rights conferred by this Agreement shall not be construed by Contractor as a waiver of the City's right to assert or rely on any such terms or rights on any future occasion or as a waiver of any other terms or rights.

N. Assignment and Performance

Neither this Agreement nor any right or interest herein shall be assigned, transferred, or encumbered without the prior written consent of the other Party. In addition, Contractor shall not subcontract any portion of the Work required by this Agreement, except as provided in the Schedule of Subcontractor Participation. City may terminate this Agreement, effective immediately, if there is any assignment, or attempted assignment, transfer, or encumbrance, by Contractor of this Agreement or any right or interest herein without City's prior written consent.

Contractor represents that each person who will render services pursuant to this Agreement is duly qualified to perform such services by all appropriate governmental authorities, where required, and that each such person is reasonably experienced and skilled in the area(s) for which he or she will render his or her services.

Contractor shall perform Contractor's duties, obligations, and services under this Agreement in a skillful and respectable manner. The quality of the Contractor's performance and all interim and final product(s) provided to or on behalf of the City shall be comparable to the best local and national standards.

In the event the Contractor engages any subcontractor in the performance of this Agreement, Contractor shall ensure that all of Contractor's subcontractors perform in accordance with the terms and conditions of this Agreement. Contractor shall be fully responsible for all of Contractor's subcontractors' performance, and liable for any of Contractor's subcontractors' non-performance and all of Contractor's subcontractors' acts and omissions. Contractor shall defend at Contractor's expense, counsel being subject to City's approval or disapproval, and indemnify and hold City and City's officers, employees, and agents harmless from and against any claim, lawsuit, third party action, fine, penalty, settlement, or judgment, including any award of attorney fees and any award of costs, by or in favor of any of Contractor's subcontractors for payment for work performed for City by any of such subcontractors, and from and against any claim, lawsuit, third party action, fine, penalty, settlement, or judgment, including any award of attorney fees and any award of costs, occasioned by or arising out of any act or omission by any of Contractor 's subcontractors or by any of Contractor's subcontractors' officers, agents, or employees. Contractors' use of subcontractors in connection with this Agreement shall be subject to City's prior written approval, which approval City may revoke at any time.

O. Conflicts

Neither Contractor nor any of Contractor's employees shall have or hold any continuing or frequently recurring employment or contractual relationship that is substantially antagonistic or incompatible with Contractor's loyal and conscientious exercise of judgment and care related to Contractor's performance under this Agreement.

Contractor further agrees that none of Contractor's officers or employees shall, during the term of this Agreement, serve as an expert witness against City in any legal or administrative proceeding in which he, she, or Contractor is not a party, unless compelled by court process. Further, Contractor agrees that such persons shall not give sworn testimony or issue a report or writing, as an expression of his or her expert opinion, which is adverse or prejudicial to the interests of City in connection with any such pending or threatened legal or administrative proceeding unless compelled by court process. The limitations of this section shall not preclude Contractor or any persons in any way from representing themselves, including giving expert testimony in support thereof, in any action or in any administrative or legal proceeding.

In the event Contractor is permitted pursuant to this Agreement to utilize subcontractors to perform any services required by this Agreement, Contractor agrees to require such subcontractors, by written contract, to comply with the provisions of this Section to the same extent as Contractor.

P. Schedule and Delays

Time is of the essence in this Agreement. By signing, Contractor affirms that it believes the schedule to be reasonable; provided, however, the Parties acknowledge that the schedule might be modified as the City directs.

Q. Materiality and Waiver of Breach

City and Contractor agree that each requirement, duty, and obligation set forth herein was bargained for at arm's-length and is agreed to by the Parties in exchange for *quid pro quo*, that each is substantial and important to the formation of this Agreement and that each is, therefore, a material term hereof.

City's failure to enforce any provision of this Agreement shall not be deemed a waiver of such provision or modification of this Agreement. A waiver of any breach of a provision of this Agreement shall not be deemed a waiver of any subsequent breach and shall not be construed to be a modification of the terms of this Agreement.

R. Compliance With Laws

Contractor shall comply with all applicable federal, state, and local laws, codes, ordinances, rules, and regulations in performing Contractor's duties, responsibilities, and obligations pursuant to this Agreement.

S. Severance

In the event a portion of this Agreement is found by a court of competent jurisdiction to be invalid or unenforceable, the provisions not having been found by a court of competent jurisdiction to be invalid or unenforceable shall continue to be effective.

T. Limitation of Liability

The City desires to enter into this Agreement only if in so doing the City can place a limit on the City's liability for any cause of action for money damages due to an alleged breach by the City of this Agreement, so that its liability for any such breach never exceeds the sum of \$1,000. Contractor hereby expresses its willingness to enter into this Agreement with Contractor's recovery from the City for any damage action for breach of contract or for any action or claim arising from this Agreement to be limited to a maximum amount of \$1,000 less the amount of all funds actually paid by the City to Contractor pursuant to this Agreement.

Accordingly, and notwithstanding any other term or condition of this Agreement, Contractor hereby agrees that the City shall not be liable to Contractor for damages in an amount in excess of \$1,000 which amount shall be reduced by the amount actually paid by the City to Contractor pursuant to this Agreement, for any action for breach of contract or for any action or claim arising out of this Agreement. Nothing contained in this paragraph or elsewhere in this Agreement is in any way intended to be a waiver of the limitation placed upon City's liability as set forth in Section 768.28, Florida Statutes (2024), as may be amended or revised.

U. Jurisdiction, Venue, Waiver, Waiver of Jury Trial

The Agreement shall be interpreted and construed in accordance with, and

governed by, the laws of the state of Florida. The Parties agree that the exclusive venue for any lawsuit arising from, related to, or in connection with this Agreement shall be in the state courts of the Seventeenth Judicial Circuit in and for Broward County, Florida. If any claims arising from, related to, or in connection with this Agreement must be litigated in federal court, the Parties agree that the exclusive venue for any such lawsuit shall be in the United States District Court or United States Bankruptcy Court for the Southern District of Florida. **BY ENTERING INTO THIS AGREEMENT, THE PARTIES HEREBY EXPRESSLY WAIVE ANY AND ALL RIGHTS EITHER PARTY MIGHT HAVE TO A TRIAL BY JURY OF ANY ISSUES RELATED TO THIS AGREEMENT. IF A PARTY FAILS TO WITHDRAW A REQUEST FOR A JURY TRIAL IN A LAWSUIT ARISING OUT OF THIS AGREEMENT AFTER WRITTEN NOTICE BY THE OTHER PARTY OF VIOLATION OF THIS SECTION, THE PARTY MAKING THE REQUEST FOR JURY TRIAL SHALL BE LIABLE FOR THE REASONABLE ATTORNEYS' FEES AND COSTS OF THE OTHER PARTY IN CONTESTING THE REQUEST FOR JURY TRIAL, AND SUCH AMOUNTS SHALL BE AWARDED BY THE COURT IN ADJUDICATING THE MOTION.**

V. Amendments

No modification, amendment, or alteration in the terms or conditions contained herein shall be effective unless contained in a written document prepared with the same or similar formality as this Agreement and executed by the City's Mayor and/or City Manager, as determined by the City Charter and Ordinances of the City of Fort Lauderdale, Florida, and Contractor, or others delegated authority to or otherwise authorized to execute same on their behalf.

W. Prior Agreements

This document represents the final and complete understanding of the Parties and incorporates or supersedes all prior negotiations, correspondence, conversations, agreements, and understandings applicable to the matters contained herein. The Parties agree that there is no commitment, agreement, or understanding concerning the subject matter of this Agreement that is not contained in this written document. Accordingly, the Parties agree that no deviation from the terms hereof shall be predicated upon any prior representation or agreement, whether oral or written.

X. Payable Interest

Except as required and provided for by the Florida Local Government Prompt Payment Act, City shall not be liable for interest for any reason, whether as prejudgment interest or for any other purpose, and in furtherance thereof Contractor waives, rejects, disclaims and surrenders any and all entitlement it has or may have to receive interest in connection with a dispute or claim based on or related to this Agreement.

Y. Representation of Authority

Each individual executing this Agreement on behalf of a party hereto hereby

represents and warrants that he or she is, on the date he or she signs this Agreement, duly authorized by all necessary and appropriate action to execute this Agreement on behalf of such party and does so with full legal authority.

Z. Uncontrollable Circumstances ("Force Majeure")

The City and Contractor will be excused from the performance of their respective obligations under this Agreement when and to the extent that their performance is delayed or prevented by any circumstances beyond their control including, fire, flood, explosion, strikes or other labor disputes, act of God or public emergency, war, riot, civil commotion, malicious damage, act or omission of any governmental authority, delay or failure or shortage of any type of transportation, equipment, or service from a public utility needed for their performance, provided that:

1. The non-performing party gives the other party prompt written notice describing the particulars of the Force Majeure including, but not limited to, the nature of the occurrence and its expected duration, and continues to furnish timely reports with respect thereto during the period of the Force Majeure;
2. The excuse of performance is of no greater scope and of no longer duration than is required by the Force Majeure;
3. No obligations of either party that arose before the Force Majeure causing the excuse of performance are excused as a result of the Force Majeure; and
4. The non-performing party uses its best efforts to remedy its inability to perform. Notwithstanding the above, performance shall not be excused under this Section for a period in excess of two (2) months, provided that in extenuating circumstances, the City may excuse performance for a longer term. Economic hardship of the Contractor will not constitute Force Majeure. The term of the Agreement shall be extended by a period equal to that during which either Party's performance is suspended under this Section.

AA. Scrutinized Companies

The Contractor certifies that it is not on the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2024), and that it is not engaged in a boycott of Israel. The City may terminate this Agreement at the City's option if the Contractor is found to have submitted a false certification as provided under subsection (5) of Section 287.135, Florida Statutes (2024), as may be amended or revised, or been placed on the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2024), as may be amended or revised, or is engaged in a boycott of Israel.

BB. Attorney Fees

If City or Contractor incurs any expense in enforcing the terms of this

Agreement through litigation, the prevailing Party in that litigation shall be reimbursed for all such costs and expenses, including but not limited to court costs, and reasonable attorney fees incurred during litigation.

CC. Resolution of Disputes

Questions, claims, difficulties and disputes of whatever nature which may arise relative to the technical interpretation of the Contract Documents and fulfillment of this Agreement as to the character, quality, amount and value of any work done and materials furnished, or proposed to be done or furnished under, or by reason of, the Contract Documents which cannot be resolved by mutual agreement of City Project Manager and Contractor shall be submitted to the City Manager or his designee and Contractor's representative for resolution. Prior to any litigation being commenced, for any disputes which remain unresolved, within sixty (60) days after final completion of the Work, the Parties shall participate in mediation to address all unresolved disputes to a mediator agreed upon by the Parties. Should any objection not be resolved in mediation, the Parties retain all their legal rights and remedies provided under the laws of Florida. Failure by a Party to comply in strict accordance with the requirements of this Article, then said Party specifically waives all of its rights provided hereunder, including its rights and remedies under the laws of Florida.

All non-technical administrative disputes (such as billing and payment) shall be determined by Contract Administrator.

During the pendency of any dispute and after a determination thereof, Contractor and Contract Administrator shall act in good faith to mitigate any potential damages including utilization of construction schedule changes and alternate means of construction. During the pendency of any dispute arising under this Agreement, other than termination herein, Contractor shall carry on the Work and adhere to the progress schedule. The Work shall not be delayed or postponed pending resolution of any disputes or disagreements.

For any disputes which remain unsolved, within sixty (60) calendar days after Final Completion of the Work, the Parties shall participate in mediation to address all unresolved disputes. A mediator shall be mutually agreed upon by the Parties. Should any objection not be resolved in mediation, the Parties retain all their legal rights and remedies under applicable law. If a Party objecting to a determination, fails to comply in strict accordance with the requirements of this Article, said Party specifically waives all of its rights provided hereunder, including its rights and remedies under applicable law.

DD. Public Records

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES (2024), TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE

**CUSTODIAN OF PUBLIC RECORDS AT CITY CLERK'S
OFFICE, 1 EAST BROWARD BOULEVARD, SUITE 444, FORT
LAUDERDALE, FLORIDA 33301, PHONE: 954-828-5002,
EMAIL: PRRCONTRACT@FORT LAUDERDALE. GOV.**

Contractor shall comply with public records laws, and Contractor shall:

1. Keep and maintain public records required by the City to perform the service.
2. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes (2024), as may be amended or revised, or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion of the Agreement if the Contractor does not transfer the records to the City.
4. Upon completion of the Agreement, transfer, at no cost, to the City all public records in possession of the Contractor or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of the Agreement, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Agreement, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.

EE. Non-Discrimination

The Contractor shall not discriminate against its employees based on the employee's race, color, religion, gender, gender identity, gender expression, marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law.

1. The Contractor certifies and represents that the Contractor offers the same health benefits to the domestic partners of its employees as are offered its employees' spouses or offers its employees the cash equivalent of such health benefits because it is unable to provide health benefits to its employees' domestic partners, and that the Contractor will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, (2024), as may be amended or revised; ("Section 2-187"), during the entire term of this Agreement.

2. The Contractor certifies and represents that it will comply with Section

2-187, Code of Ordinances of the City of Fort Lauderdale, Florida ("Section 2-187").

3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.

4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.

5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in Section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.

FF. E-Verify

As a condition precedent to the effectiveness of this Agreement, pursuant to Section 448.095, Florida Statutes (2024), as may be amended or revised, the Contractor and its subcontractors shall register with and use the E-Verify system to electronically verify the employment eligibility of newly hired employees.

1. The Contractor shall require each of its subcontractors, if any, to provide the Contractor with an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. The Contractor shall maintain a copy of the subcontractor's affidavit for the duration of this Agreement and in accordance with the public records requirements of this Agreement.

2. The City, the Contractor, or any subcontractor who has a good faith belief that a person or entity with which it is contracting has knowingly violated Subsection 448.09(1), Florida Statutes (2024), as may be amended or revised, shall terminate the contract with the person or entity.

3. The City, upon good faith belief that a subcontractor knowingly violated the provisions of Subsection 448.095(5), Florida Statutes (2024), as may be amended or revised, but that the Contractor otherwise complied with Subsection 448.095(5), Florida Statutes (2024), as may be amended or revised, shall promptly notify Contractor and order the Contractor to immediately terminate the contract with the subcontractor, and the Contractor shall comply with such order.

4. A contract terminated under Subparagraph 448.095(5)(c)1. or 2., Florida Statutes (2024), as may be amended or revised, is not a breach of contract and may not be considered as such. If the City terminates this contract under Paragraph 448.095(5)(c), Florida Statutes (2024), as may be amended or revised, the Contractor may not be awarded a public contract for at least one year after the date on which the Agreement was terminated. The Contractor is liable for any additional costs incurred by the City as a result of termination of this Agreement.

5. Contractor shall include in each of its subcontracts, if any, the

requirements set forth in this Section, including this subparagraph, requiring any and all subcontractors, as defined in Subsection 448.095(1)(e), Florida Statutes (2024), as may be amended or revised, to include all of the requirements of this Section in their subcontracts. Contractor shall be responsible for compliance by any and all subcontractors, as defined in Subsection 448.095(1)(e), Florida Statutes (2024), as may be amended or revised, with the requirements of Section 448.095, Florida Statutes (2024), as may be amended or revised.

GG. Notices

Whenever either party desires to give notice unto the other, it shall be given by written notice, sent certified by U.S. Mail, return receipt requested or via nationally recognized overnight courier addressed to the party to whom it is intended, at the places last specified, and the places for giving notice shall remain such until they are changed by written notice in compliance with this subsection. For the present, the parties designate the following as respective places for giving notice, to wit:

FOR CITY: City Manager
 City of Fort Lauderdale
 401 SE 21st Street
 Fort Lauderdale, Florida 33316

WITH A COPY: City Attorney
 City of Fort Lauderdale
 1 East Broward Boulevard
 Fort Lauderdale, Florida 33301

FOR CONTRACTOR: Israel Denis, Managing Director
 Arisma Group, LLC dba Cendien
 1846 E. Rosemeade Parkway, Suite 200
 Carrollton, Texas 75007
 Phone: 214-245-4580
 Email: idenis@cendien.com

HH. Anti-Human Trafficking

As a condition precedent to the effectiveness of this Agreement, the CONTRACTOR shall provide the City with an affidavit on a form approved by the City and signed by an officer or a representative of the CONTRACTOR under penalty of perjury attesting that the CONTRACTOR does not use coercion for labor or services as defined in Section 787.06, Florida Statutes (2024), as may be amended or revised.

IN WITNESS WHEREOF, the City and the Contractor execute this Agreement as follows:

CITY


ATTEST:

CITY OF FORT LAUDERDALE, a Florida
municipality


David R. Soloman, City Clerk



By:


Dean J. Trantalis, Mayor

Date:

4/28/25

By:



Rickelle Williams
City Manager

Approved as to Form and Correctness:
D'Wayne M. Spence, Interim City Attorney

By:


Eric W. Abend

Senior Assistant City Attorney

CONTRACTOR

WITNESSES:

ARISMA GROUP, LLC D/B/A CENDIEN,
a Texas company authorized to conduct
business in the State of Florida.

Eli Soto
Signature
Eli Soto
Print Name
[Signature]
Signature
DW NELSON
Print Name

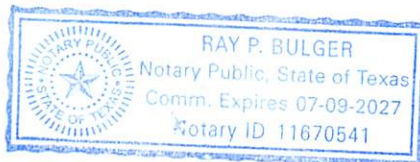
By:

[Signature]
Israel Denis, Manager

(CORPORATE SEAL)

STATE OF TEXAS :
COUNTY OF DENTON :

The foregoing instrument was acknowledged before me by means of ☒ physical
presence or ☐ online notarization, this 14 day of April, 2025,
by Israel Denis, as Manager, for Arisma Group, LLC d/b/a Cendien, a Texas
company authorized to conduct business in the State of Florida.



[Signature]
(Signature of Notary Public – State of TX)

Ray P. Bulger
Print, Type or Stamp Commissioned
Name of Notary Public)

Personally Known X OR Produced Identification X
Type of Identification Produced Tx Drivers Lic



Event # 380-0

Name: Infor CloudSuite Managed Services

Description: The City of Fort Lauderdale is seeking contract managed services from an Infor certified partner for Infor CloudSuite support in its ERP/INFOR Unit, Information Technology Division. The Contractor shall provide application support for Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll, Version 11.

Term: 2 Year Contract with two 1-year renewals.

Buyer: PLATKIN, LAURIE D.

Status: Open

Event Type: RFP

Currency: USD

Sealed Bid: Yes

Respond To All Lines: No

Q & A Allowed: Yes

Number Of Amendments: 0

Display Bid Tabulation: Display When Event Awarded And Closed

Event Dates

Preview:

Q & A Open: 10/30/2024 05:00:00 PM

Open: 10/30/2024 04:00:00 PM

Q & A Close: 11/14/2024 05:00:30 PM

Close: 11/21/2024 02:00:00 PM

Dispute Close:

Questions

| Question | Response Type | Attachment |
|--|---------------|--|
| Did you download, review, sign and re-upload the required forms? | Yes No | _Required Forms Packet - Forms 1-9.pdf |

Event # 380-0: Infor CloudSuite Managed Services

| Question | Response Type | Attachment |
|---|---------------|---|
| Do you acknowledge that if your firm is awarded this contract, your firm will have to complete and submit the attached - Anti-Human Trafficking Affidavit Per Florida Statute 787.06 (2024), (13). Florida Statute 787.06 (2024), (13) When a contract is executed, renewed, or extended between a nongovernmental entity and a governmental entity, the nongovernmental entity must provide the governmental entity with an affidavit signed by an officer or a representative of the nongovernmental entity under penalty of perjury attesting that the nongovernmental entity does not use coercion for labor or services as defined in this section. For purposes of this subsection, the term "governmental entity" has the same meaning as in s. 287.138(1). | Yes No | Anti-Human Trafficking Affidavit 8-6-2024.pdf |
| Do you acknowledge that if your firm is awarded this contract, your firm will have to complete and submit the attached Affidavit of Compliance with Foreign Entity Laws Per Florida Statute - §287.138, 692.201, 692.202, 692.203, and 692.204 | Yes No | CoFL-Affidavit of Compliance with Foreign Entity Laws_EPDF11-23.pdf |

Attachments

| Name | Description | Attachment |
|---------------------------------|--------------------------------|---|
| 380 - RFP Specifications | | 380 - Solicitation V5.pdf |
| E380 - Additional Pricing Sheet | E380 - Additional Pricing.xlsx | E380 - Attachment A |
| CoFL General Conditions | | 1. General Conditions - Rev 08-2023.pdf |

Commodity Codes

| Commodity Code | Description |
|----------------|--|
| 918-71 | IT Consulting |
| 958-77 | Project Management Services |
| 962-58 | Professional Services (Not Otherwise Classified) |

Event # 380-0: Infor CloudSuite Managed Services

Line Details

Line 1: Estimated 25 hours per week / 1300 per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Infor Managed Supports Services... Estimated 25 hours per week / 1300 per year.

Item: INFOR MANAGED SERVICES SUPPORT Estimated 25 hours per week / 1300 per year

Commodity 958-77 Project Management Services
Code:

Manufacturer MFC
Code:

Division: DIV

Manufacturer INFOR MANAGED
Number: SERVICES SUPPORT

Quantity: 1,300.0000

Unit of HR
Measure:

Require Yes
Response:

Price Breaks No
Allowed:

Allow Alternate No
Responses:

Add On No
Charges
Allowed:

Line 2: YEAR 3 - % INCREASE ON HOURLY RATE

Description: Hourly Price - Annual Managed Supports Services... No pricing should be submitted here only % increase on hourly rate from Year's 1-2.

Item: YEAR 3 - % INCREASE YEAR 3 - % INCREASE ON HOURLY RATE

Commodity 958-77 Project Management Services
Code:

Manufacturer MFC
Code:

Division: DIV

Quantity: 1.0000

Unit of PT
Measure:

Require No
Response:

Price Breaks No
Allowed:

Allow Alternate No
Responses:

Add On No
Charges

Event # 380-0: Infor CloudSuite Managed Services

Allowed:

Line 4: YEAR 4 - % INCREASE ON HOURLY RATE

Description: Hourly Price - Annual Managed Supports Services... No pricing should be submitted here only % increase on hourly rate from Year 3.

Item: YEAR 4 - % INCREASE YEAR 4 - % INCREASE ON HOURLY RATE

Commodity Code: 958-77 Project Management Services

Manufacturer Code: MFC

Division: DIV

Quantity: 1.0000

Unit of PT Measure:

Require No Response:

Price Breaks No Allowed:

Allow Alternate No Responses:

Add On No Charges Allowed:

Line 5: Estimated 30 hrs. per week / 1560 hours per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Estimated 30 hrs. per week / 1560 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 30 hrs. per week / 1560 hours per year

Commodity Code: 958-77 Project Management Services

Manufacturer Code: MFC

Division: DIV

Quantity: 1,560.0000

Unit of EA Measure:

Require No Response:

Price Breaks No Allowed:

Allow Alternate No Responses:

Add On No Charges Allowed:

Line 6: Estimated 33 hrs. per week / 1716 hours per year

Event # 380-0: Infor CloudSuite Managed Services

Description: Estimated 33 hrs. per week / 1716 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 33 hrs. per week / 1716 hours per year

Commodity 958-77 Project Management Services
Code:

Quantity: 1,716.0000 **Unit of HR Measure:**

| | | |
|-----------------------------------|---------------------------------|--------------------------------------|
| Require No Response: | Price Breaks No Allowed: | Allow Alternate No Responses: |
| Add On No Charges Allowed: | | |

Line 7: Estimated 35 hrs. per week / 1820 hours per year

Description: Estimated 35 hrs. per week / 1820 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 35 hrs. per week / 1820 hours per year

Commodity 958-77 Project Management Services
Code:

Quantity: 1,820.0000 **Unit of HR Measure:**

| | | |
|-----------------------------------|---------------------------------|--------------------------------------|
| Require No Response: | Price Breaks No Allowed: | Allow Alternate No Responses: |
| Add On No Charges Allowed: | | |

Line 8: Estimated 40 hrs. per week / 2080 hours per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Estimated 40 hrs. per week / 2080 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 40 hrs. per week / 2080 hours per year

Commodity 958-77 Project Management Services
Code:

Quantity: 2,080.0000 **Unit of HR Measure:**

| | | |
|-----------------------------|---------------------------------|--------------------------------------|
| Require No Response: | Price Breaks No Allowed: | Allow Alternate No Responses: |
|-----------------------------|---------------------------------|--------------------------------------|

Event # 380-0: Infor CloudSuite Managed Services

**Add On No
Charges
Allowed:**

Line 9: Infor Absence Management Post-Go-Live Audit

Description: Proposers shall attach a separate quote with pricing breakdown by Title/ Role.

Item: SPECIAL PROJECT #1 Infor Absence Management Post-Go-Live Audit

Commodity 918-71 IT Consulting
Code:

Quantity: 1.0000

**Unit of LS
Measure:**

**Require No
Response:**

**Price Breaks No
Allowed:**

**Allow Alternate No
Responses:**

**Add On No
Charges
Allowed:**

SECTION I – INTRODUCTION AND INFORMATION

1.1 Purpose

The City of Fort Lauderdale, Florida (City) is seeking qualified, experienced and licensed firm(s), hereinafter referred to as Contractor, Bidder or Proposer, to provide Infor CloudSuite application support and managed services for the City, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP).

1.2 Point of Contact

For information concerning procedures for responding to this solicitation, contact Senior Procurement Specialist, Laurie Platkin at (954) 828-5138 or email at lplatkin@fortlauderdale.gov. Such contact shall be for clarification purposes only.

For information concerning technical specifications, please utilize the question / answer feature provided by the City's on-line strategic sourcing platform. Questions of a material nature must be received prior to the cut-off date specified in the RFP Schedule. Material changes, if any, to the scope of services or bidding procedures will only be transmitted by written addendum. Contractors please note: Proposals shall be submitted as stated in PART IV – Submittal Requirements. No part of your proposal can be submitted via FAX. No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the Contractor has familiarized themselves with the nature and extent of the work, and the equipment, materials, and labor required. The entire proposal must be submitted in accordance with all specifications contained in this solicitation. The questions and answers submitted in the City's on-line strategic sourcing platform shall become part of any contract that is created from this RFP.

1.3 Pre-proposal Conference and Site Visit

There will not be a pre- bid/proposal conference or site visit for this Request for Proposal.

It will be the sole responsibility of the Contractor to become familiar with the scope of the City's requirements and systems prior to submitting a proposal. No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the Proposer has familiarized themselves with the nature and extent of the work, equipment, materials, and labor required.

1.4 CITY'S ON-LINE STRATEGIC SOURCING PLATFORM

The City of Fort Lauderdale uses the City's on-line strategic sourcing platform to administer the competitive solicitation process, including but not limited to soliciting proposals, issuing addenda, posting results and issuing notification of an intended decision. There is no charge to register and download the RFP from the City's on-line strategic sourcing platform. Proposers are strongly encouraged to read the supplier tutorials available in the City's on-line strategic sourcing platform well in advance of their intention of submitting a proposal to ensure familiarity with the use of the City's on-line strategic sourcing platform. The City shall not be responsible for a Proposers inability to submit a Proposal by the end date and time for any reason, including issues arising from the use of the City's on-line strategic sourcing platform.

It is the sole responsibility of the Proposer to ensure that their proposal is submitted electronically through the City's on-line strategic sourcing platform no later than the time and date specified in this solicitation. PAPER PROPOSAL SUBMITTALS WILL NOT BE ACCEPTED. PROPOSALS MUST BE SUBMITTED ELECTRONICALLY VIA the City's on-line strategic sourcing platform.

1.5 Electronic Bid Openings/Proposal Closings

Please be advised that effective immediately, and until further notice, all Invitation to Bids, Request for Proposals, Request for Qualifications, and other solicitations led by the City of Fort Lauderdale will be opened electronically via the City's on-line strategic sourcing platform at the date and time indicated on the solicitation. All openings will be held on the City's on-line strategic sourcing platform.

Anyone requesting assistance or having further inquiry in this matter must contact the Procurement Specialist indicated on the solicitation, via the Question-and-Answer forum on the City's on-line strategic sourcing platform before the Last Day for Questions indicated in the Solicitation.

SECTION II - SPECIAL TERMS AND CONDITIONS

2.1 General Conditions

RFP General Conditions (Form G-107, Rev. 02/22) are included and made a part of this RFP.

2.2 Addenda, Changes, and Interpretations

It is the sole responsibility of each firm to notify the Buyer utilizing the question / answer feature provided by the City's on-line strategic sourcing platform and request modification or clarification of any ambiguity, conflict, discrepancy, omission, or other error discovered in this competitive solicitation. Requests for clarification, modification, interpretation, or changes must be received prior to the Question and Answer (Q & A) Deadline. Requests received after this date may not be addressed. Questions and requests for information that would not materially affect the scope of services to be performed or the solicitation process will be answered within the question / answer feature provided by the City's on-line strategic sourcing platform and shall be for clarification purposes only. Material changes, if any, to the scope of services or the solicitation process will only be transmitted by official written addendum issued by the City and uploaded to the City's on-line strategic sourcing platform as a separate addendum to the RFP. Under no circumstances shall an oral explanation given by any City official, officer, staff, or agent be binding upon the City and should be disregarded. All addenda are a part of the competitive solicitation documents, and each firm will be bound by such addenda. It is the responsibility of each to read and comprehend all addenda issued.

2.3 Changes and Alterations

Proposer may change or withdraw a Proposal at any time prior to Proposal submission deadline; however, no oral modifications will be allowed. Modifications shall not be allowed following the Proposal deadline.

2.4 Proposer's Costs

The City shall not be liable for any costs incurred by Proposers in responding to this RFP.

2.5 Pricing/Delivery

All pricing should be identified on the Cost Proposal page provided in this RFP. No additional costs may be accepted, other than the costs stated on the Cost Proposal page. Failure to use the City's Cost Proposal page and provide costs as requested in this RFP may deem your proposal non-responsive.

Contractor shall quote a firm, fixed price for all services stated in the RFP. All costs including travel shall be included in your proposal. The City shall not accept any additional costs including any travel associated with coming to the City of Fort Lauderdale.

2.6 Price Validity

Prices provided in this Request for Proposals (RFP) shall be valid for at least One Hundred and Twenty (120) days from time of RFP opening unless otherwise extended and agreed upon by the City and Bidder/Proposer. The City shall award contract within this time period or shall request to the recommended awarded vendor an extension to hold pricing, until products/services have been awarded.

2.7 Invoices/Payment

The City will accept invoices no more frequently than once per month. Each invoice shall fully detail the related costs and shall specify the status of the particular task or project as of the date of the invoice with regard to the accepted schedule for that task or project. Payment will be made

within forty-five (45) days after receipt of an invoice acceptable to the City, in accordance with the Florida Local Government Prompt Payment Act. If, at any time during the contract, the City shall not approve or accept the Contractor's work product, and agreement cannot be reached between the City and the Contractor to resolve the problem to the City's satisfaction, the City shall negotiate with the Contractor on a payment for the work completed and usable to the City.

A payment schedule based upon agreed upon deliverables may be developed with the awarded Contractor.

2.8 Related Expenses/Travel Expenses

All costs including travel are to be included in your bid. The City will not accept any additional costs.

2.9 Payment Method

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to payment by credit card via MasterCard or Visa. This allows you as a vendor of the City of Fort Lauderdale to receive your payment fast and safely. No more waiting for checks to be printed and mailed. Payments will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, firms must presently have the ability to accept credit card payment or take whatever steps necessary to implement acceptance of a credit card before the commencement of a contract. See Contract Payment Method form attached.

2.10 Mistakes

The proposer shall examine this RFP carefully. The submission of a Proposal shall be prima facie evidence that the consultant has full knowledge of the scope, nature, and quality of the work to be performed; the detailed requirements of the specifications; and the conditions under which the work is to be performed. Ignorance of the requirements will not relieve the consultant from liability and obligations under the Contract.

2.11 Acceptance of Proposals / Minor Irregularities

2.11.1 The City reserves the right to accept or reject any or all proposals, part of proposals, and to waive minor irregularities or variances to specifications contained in proposals which do not make the proposal conditional in nature and minor irregularities in the solicitation process. A minor irregularity shall be a variation from the solicitation that does not affect the price of the contract or does not give a respondent an advantage or benefit not enjoyed by other respondents, does not adversely impact the interests of other firms, or does not affect the fundamental fairness of the solicitation process. The City also reserves the right to reissue a Request for Proposal.

2.11.2 The City reserves the right to disqualify Proposer during any phase of the competitive solicitation process and terminate for cause any resulting contract upon evidence of collusion with intent to defraud or other illegal practices on the part of the Proposer.

2.12 Modification of Services

2.12.1 While this contract is for services provided to the department referenced in this RFP, the City may require similar work for other City departments. Successful Proposer agrees to take on such work unless such work would not be considered reasonable or become an undue burden to the Successful Proposer.

2.12.2 The City reserves the right to delete any portion of the work at any time without cause, and if such right is exercised by the City, the total fee shall be reduced in the same ratio as

the estimated cost of the work deleted bears to the estimated cost of the work originally planned. If work has already been accomplished and approved by the City on any portion of a contract resulting from this RFP, the Successful Proposer shall be paid for the work completed on the basis of the estimated percentage of completion of such portion to the total project cost.

2.12.3 The City may require additional items or services of a similar nature, but not specifically listed in the contract. The Successful Proposer agrees to provide such items or services and shall provide the City prices on such additional items or services. If the price(s) offered are not acceptable to the City, and the situation cannot be resolved to the satisfaction of the City, the City reserves the right to procure those items or services from other vendors, or to cancel the contract upon giving the Successful Proposer thirty (30) days written notice.

2.12.4 If the Successful Proposer and the City agree on modifications or revisions to the task elements, after the City has approved work to begin on a particular task or project, and a budget has been established for that task or project, the Successful Proposer will submit a revised budget to the City for approval prior to proceeding with the work.

2.13 Non-Exclusive Contract

Proposer agrees and understands that the contract shall not be construed as an exclusive arrangement and further agrees that the City may, at any time, secure similar or identical services from another vendor at the City's sole option.

2.14 Sample Contract Agreement

A sample of the formal agreement template, which may be required to be executed by the awarded vendor can be found at our website.

2.15 Responsiveness

In order to be considered responsive to the solicitation, the firm's proposal shall fully conform in all material respects to the solicitation and all its requirements, including all form and substance.

2.16 Responsibility

In order to be considered as a responsible firm, firm shall be fully capable to meet all of the requirements of the solicitation and subsequent contract, must possess the full capability, including financial and technical, to perform as contractually required, and must be able to fully document the ability to provide good faith performance.

2.17 Minimum Qualifications

Proposers shall be in the business of Infor CloudSuite application support and managed services, shall be an Infor certified partner for Infor CloudSuite, and must possess sufficient financial support, equipment, and organization to ensure that it can satisfactorily perform the services if awarded a Contract. Proposers must demonstrate that they, or the key staff assigned to the project, have successfully provided services with similar magnitude to those specified in the scope of services to at least one entity similar in size and complexity to the City of Fort Lauderdale or can demonstrate they have the experience with large scale private sector clients and the managerial and financial ability to successfully perform the work.

Proposers shall satisfy each of the following requirements cited below. Failure to do so may result in the proposal being deemed non-responsive.

2.17.1 Proposer or principals shall have relevant experience in Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll, Version 11 and shall provide case studies or references from similar projects.

2.17.2 Before awarding a contract, the City reserves the right to require that a Proposer submit such evidence of qualifications as the City may deem necessary. Further, the City may consider any evidence of the financial, technical, and other qualifications and abilities of a firm or principals, including previous experiences of same with the City and performance evaluation for services, in making the award in the best interest of the City.

2.17.3 Firm or principals shall have no record of judgments, pending lawsuits against the City or criminal activities involving moral turpitude and not have any conflicts of interest that have not been waived by the City Commission.

2.17.4 Neither firm nor any principal, officer, or stockholder shall be in arrears or in default of any debt or contract involving the City, (as a party to a contract, or otherwise); nor have failed to perform faithfully on any previous contract with the City.

2.18 Lobbying Activities

ALL CONTRACTORS PLEASE NOTE: Any contractor submitting a response to this solicitation must comply, if applicable, with City of Fort Lauderdale Ordinance No. C-11-42, and Resolution No. 07-101, Lobbying Activities. Copies of Ordinance No. C-11-42 and Resolution No. 07-101 may be obtained from the City Clerk's Office, located at 1 East Broward Boulevard, Suite 444, Fort Lauderdale, Florida 33301.

2.19 Local Business Preference

2.19.1 Section 2-186, Code of Ordinances of the City of Fort Lauderdale, provides for a local business preference. In order to be considered for a local business preference, a Proposer must include the Local Business Preference Certification Statement of this RFP, as applicable to the local business preference class claimed at the time of Proposal submittal:

2.19.2 Upon formal request of the City, based on the application of a Local Business Preference the Proposer shall within ten (10) calendar days submit the following documentation to the Local Business Preference Class claimed:

A. Copy of City of Fort Lauderdale current year business tax receipt, or Broward County current year business tax receipt, and

B. List of the names of all employees of the Proposer and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

2.19.3 Failure to comply at time of Proposal submittal shall result in the Proposer being found ineligible for the local business preference.

2.19.4 The complete local business preference ordinance may be found on the City's web site: [Click Here](#)

2.19.5 Definitions

- a. The term "Class A business" shall mean any business that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and shall maintain a staffing level for the proposed work of at least fifty percent (50%) who are residents of the City of Fort Lauderdale.
- b. The term "Class B business" shall mean any business that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, or shall maintain a staffing level for the proposed work of at least fifty percent (50%) who are residents of the City of Fort Lauderdale.
- c. The term "Class C business" shall mean any business that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of Broward County.
- d. The term "Class D business" shall mean any business that does not qualify as a Class A, Class B, or Class C business.

2.20 Disadvantaged Business Enterprise Preference

2.20.1 Section 2-185, Code of Ordinances of the City of Fort Lauderdale, provides for a disadvantaged business preference. In order to be considered for a disadvantaged business preference, a Proposer must include a certification from a government agency, as applicable to the disadvantaged business preference class claimed at the time of Bid/Proposal submittal:

2.20.2 Upon formal request of the City, based on the application of a Disadvantaged Business Preference the Proposer shall within ten (10) calendar days submit the following documentation to the Disadvantaged Business Enterprise Preference Class claimed:

- a. Copy of City of Fort Lauderdale current year business tax receipt, or the Tri-County (Broward, Dade, West Palm Beach) current year business tax receipt, or proof of active Sunbiz status and
- b. List of the names of all employees of the Proposer and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or the Tri-County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

2.20.3 Failure to comply at time of Proposal submittal shall result in the Proposer being found ineligible for the Disadvantaged Business Enterprise Preference business preference.

2.20.4 The complete disadvantaged business preference ordinance may be found on the City's web site: [Click Here](#)

2.20.5 Definitions

- a. The term "Disadvantaged Class 1 Enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort

Lauderdale business tax and disadvantaged certification as established in the city's Procurement Manual.

- b. The term "Disadvantaged Class 2 Enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with full-time employees and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the city's Procurement Manual.
- c. The term "Disadvantaged Class 3 Enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- d. The term "Disadvantaged Class 4 Enterprise" shall mean any disadvantaged business enterprise that does not qualify as a Class 1, Class 2, or Class 3 business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.

2.21 Protest Procedure

2.21.1 Any Proposer who is not recommended for award of a contract and who alleges a failure by the city to follow the city's procurement ordinance or any applicable law, may follow the protest procedure as found in the city's procurement ordinance within five (5) days after a notice of intent to award is posted on the city's web site at the following link: [Click Here](#)

2.21.2 The complete protest ordinance may be found on the city's web site at the following link: [Click Here](#)

2.22 Public Entity Crimes

Contractor represents that the execution of this Agreement will not violate the Public Entity Crime Act, Section 287.133, Florida Statutes (2024), as may be amended or revised, which essentially provides that a person or affiliate who is a contractor, consultant, or other provider and who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to City, may not submit a bid on a contract with City for the construction or repair of a public building or public work, may not submit bids on leases of real property to City, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under an Agreement with City, and may not transact any business with City in excess of the threshold amount provided in Section 287.017, Florida Statutes (2024), as may be amended or revised, for category two purchases for a period of 36 months from the date of being placed on the convicted vendor list. Violation of this Section shall result in termination of this Agreement and recovery of all monies paid by City pursuant to this Agreement and may result in debarment from City's competitive procurement activities.

2.23 Subcontractors

2.23.1 If the Contractor proposes to use subcontractors in the course of providing these services to the City, this information shall be a part of the bid/proposal response. Such information shall be subject to review, acceptance, and approval of the City, prior to any contract award. The City reserves the right to approve or disapprove of any subcontractor candidate in its best interest and to require Contractor to replace subcontractor with one that meets City approval.

2.23.2 Contractor shall ensure that all of Contractor's subcontractors perform in accordance with the terms and conditions of this Contract. Contractor shall be fully responsible for all of Contractor's subcontractors' performance, and liable for any of Contractor's subcontractors' non-performance and all of Contractor's subcontractors' acts and omissions. Contractor shall defend, at Contractor's expense, counsel being subject to the City's approval or disapproval, and indemnify and hold harmless the City and the City's officers, employees, and agents from and against any claim, lawsuit, third-party action, or judgment, including any award of attorney fees and any award of costs, by or in favor of any Contractor's subcontractors for payment for work performed for the City.

2.23.3 Contractor shall require all its subcontractors to provide the required insurance coverage as well as any other coverage that the contractor may consider necessary, and any deficiency in the coverage or policy limits of said subcontractors will be the sole responsibility of the contractor.

2.24 Proposal Security – N/A

2.25 Payment and Performance Bond – N/A

2.25 Insurance Requirements

2.26.1 As a condition precedent to the effectiveness of this Agreement, during the term of this Agreement and during any renewal or extension term of this Agreement, the Contractor, at its sole expense, shall provide insurance of such types and with such terms and limits as noted below. Providing proof of and maintaining adequate insurance coverage are material obligations of the Contractor. The Contractor shall provide the City a certificate of insurance evidencing such coverage. The Contractor's insurance coverage shall be primary insurance for all applicable policies. The limits of coverage under each policy maintained by the Contractor shall not be interpreted as limiting the Contractor's liability and obligations under this Agreement. All insurance policies shall be through insurers authorized or eligible to write policies in the State of Florida and possess an A.M. Best rating of A-, VII or better, subject to approval by the City's Risk Manager.

2.26.2 The coverages, limits, and endorsements required herein protect the interests of the City, and these coverages, limits, and/or endorsements shall in no way be relied upon by the Contractor for assessing the extent or determining appropriate types and limits of coverage to protect the Contractor against any loss exposures, whether as a result of this Agreement or otherwise. The requirements contained herein, as well as the City's review or acknowledgement, are not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by the Contractor under this Agreement.

2.26.3 The following insurance policies and coverages are required:

Professional Liability/Errors & Omissions

Coverage must be afforded for Wrongful Acts in an amount not less than \$1,000,000 each claim and \$2,000,000 aggregate.

Contractor must keep the professional liability insurance in force until the third anniversary of expiration or early termination of this Agreement or the third anniversary of acceptance of work by the City, whichever is longer, which obligation shall survive expiration or early termination of this Agreement.

Commercial General Liability

Coverage must be afforded under a Commercial General Liability policy with limits not less than:

- \$1,000,000 each occurrence and \$2,000,000 aggregate for Bodily Injury, Property Damage, and Personal and Advertising Injury
- \$1,000,000 each occurrence and \$2,000,000 aggregate for Products and Completed Operations

Policy must include coverage for contractual liability and independent contractors.

The City, a Florida municipality, its officials, employees, and volunteers are to be included as an additional insured with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liability arising out of activities performed by or on behalf of Contractor. The coverage shall contain no special limitation on the scope of protection afforded to the City, its officials, employees, and volunteers.

Insurance Certificate Requirements

- a. Contractor shall provide the City with valid Certificates of Insurance (binders are unacceptable) no later than ten (10) days prior to the start of work contemplated in this Agreement.
- b. Contractor shall provide to the City a Certificate of Insurance having a thirty (30) day notice of cancellation; ten (10) days' notice if cancellation is for nonpayment of premium.
- c. In the event that the insurer is unable to accommodate the cancellation notice requirement, it shall be the responsibility of Contractor to provide the proper notice. Such notification will be in writing by registered mail, return receipt requested, and addressed to the certificate holder.
- d. In the event the Agreement term or any surviving obligation of Contractor following expiration or early termination of the Agreement goes beyond the expiration date of the insurance policy, Contractor shall provide the City with an updated Certificate of Insurance no later than ten (10) days prior to the expiration of the insurance currently in effect. The City reserves the right to suspend the Agreement until this requirement is met.
- e. The Certificate of Insurance shall indicate whether coverage is provided under a claims-made or occurrence form. If any coverage is provided on a claims-made form, the Certificate of Insurance must show a retroactive date, which shall be the effective date of the initial contract or prior.
- f. The City shall be included as an Additional Insured on all liability policies, with the exception of Professional Liability/Errors & Omissions.
- g. The title of the Agreement, Bid/Contract number, or other identifying reference must be listed on the Certificate of Insurance.

The Certificate Holder should read as follows:

City of Fort Lauderdale
401 SE 21st Street
Fort Lauderdale, FL 33316

- 2.26.5** Contractor has the sole responsibility for all insurance premiums and shall be fully and solely responsible for any costs or expenses as a result of a coverage deductible, co-insurance penalty, or self-insured retention; including any loss not covered because of the application of such deductible, co-insurance penalty, self-insured retention, or

coverage exclusion or limitation. Any costs for adding the City as an Additional Insured shall be at Contractor's expense.

- 2.26.6** If the Contractor's primary insurance policy/policies do not meet the minimum requirements, as set forth in this Agreement, the Contractor may provide evidence of an Umbrella/Excess insurance policy to comply with this requirement.
- 2.26.7** Contractor's insurance coverage shall be primary insurance in respect to the City's interests, a Florida municipality, its officials, employees, and volunteers. Any insurance or self-insurance maintained by the City shall be non-contributory.
- 2.26.8** Any exclusion or provision in any insurance policy maintained by the Contractor that excludes coverage required in this Agreement shall be deemed unacceptable and shall be considered breach of contract.
- 2.26.9** All required insurance policies must be maintained until the contract work has been accepted by the City, or until this Agreement is terminated, whichever is later. Any lapse in coverage shall be considered breach of contract. In addition, Contractor must provide to the City confirmation of coverage renewal via an updated certificate should any policies expire prior to the expiration of this Agreement. The City reserves the right to review, at any time, coverage forms and limits of Contractor's insurance policies.
- 2.26.10** The Contractor shall provide notice of any and all claims, accidents, and any other occurrences associated with this Agreement shall be provided to the Contractor's insurance company or companies and the City's Risk Management office as soon as practical.
- 2.26.11** It is Contractor's responsibility to ensure that any and all of Contractor's independent contractors and subcontractors comply with these insurance requirements. All coverages for independent contractors and subcontractors shall be subject to all of the applicable requirements stated herein. Any and all deficiencies are the responsibility of Contractor. The City reserves the right to adjust insurance limits from time to time at its discretion with notice to Contractor.

2.27 Award of Contract

A Contract (the "Agreement") may be awarded by the City Commission. The City reserves the right to execute or not execute, as applicable, a contract with the Proposer(s) that is determined to be in the City's best interests. The City reserves the right to award a contract to more than one Proposer, at the sole and absolute discretion of the City.

2.28 Unauthorized Work

The Successful Proposer(s) shall not begin work until a Contract has been awarded by the City Commission and a notice to proceed has been issued. Proposer(s) agree and understand that the issuance of a Purchase Order and/or Task Order shall be issued and provided to the Successful Proposer(s) following Commission award; however, receipt of a purchase order and/or task order shall not prevent the Successful Proposer(s) from commencing the work once the City Commission has awarded the contract and notice to proceed is issued.

2.29 Damage to Public or Private Property

Extreme care shall be taken to safeguard all existing facilities, site amenities, irrigation systems, vehicles, etc. on or around the job site. Damage to public and/or private property shall be the responsibility of the Contractor and shall be repaired and/or replaced at no additional cost to the City.

2.30 Safety

The Contractor(s) shall adhere to the Florida Department of Transportation's Uniform manual on Traffic Control for construction and maintenance work zones when working on or near a roadway. It will be the sole responsibility of the Contractor to make themselves and their employees fully aware of these provisions, especially those applicable to safety.

2.31 Uncontrollable Circumstances ("Force Majeure")

The City and Contractor will be excused from the performance of their respective obligations under this agreement when and to the extent that their performance is delayed or prevented by any circumstances beyond their control including, fire, flood, explosion, strikes or other labor disputes, act of God or public emergency, war, riot, civil commotion, malicious damage, act or omission of any governmental authority, delay or failure or shortage of any type of transportation, equipment, or service from a public utility needed for their performance, provided that:

2.31.1 The non-performing party gives the other party prompt written notice describing the particulars of the Force Majeure including, but not limited to, the nature of the occurrence and its expected duration, and continues to furnish timely reports with respect thereto during the period of the Force Majeure;

2.31.2 The excuse of performance is of no greater scope and of no longer duration than is required by the Force Majeure;

2.31.3 No obligations of either party that arose before the Force Majeure causing the excuse of performance are excused as a result of the Force Majeure; and

2.31.4 The non-performing party uses its best efforts to remedy its inability to perform. Notwithstanding the above, performance shall not be excused under this Section for a period in excess of two (2) months, provided that in extenuating circumstances, the City may excuse performance for a longer term. Economic hardship of the Contractor will not constitute Force Majeure. The term of the agreement shall be extended by a period equal to that during which either party's performance is suspended under this Section.

2.32 Canadian Companies

In the event Contractor is a corporation organized under the laws of any province of Canada or is a Canadian federal corporation, the City may enforce in the United States of America or in Canada or in both countries a judgment entered against the Contractor. The Contractor waives any and all defenses to the City's enforcement in Canada, of a judgment entered by a court in the United States of America. All monetary amounts set forth in this Contract are in United States dollars.

2.33 News Releases/Publicity

News releases, publicity releases, or advertisements relating to this contract, or the tasks or projects associated with the project shall not be done without prior City approval.

2.34 Manufacturer/Brand/Model Specific Request

This is a manufacturer/brand/model specification. No substitutions will be allowed.

2.35 Contract Period

The initial contract term shall commence upon final execution of the contract by the City and shall two (2) years from that date. The City reserves the right to extend the contract for two (2), additional one-year terms providing all terms conditions and specifications remain the same, both parties agree to the extension, and such extension is approved by the City.

In the event services are scheduled to end because of the expiration of this contract, the Contractor shall continue the service upon the request of the City as authorized by the awarding authority. The extension period shall not extend for more than 270 days beyond the expiration date of the existing contract. The Contractor shall be compensated for the service at the rate in effect when this extension clause is invoked by the City.

2.36 Cost Adjustments

Prices quoted shall be firm for the initial contract term of two (2) year(s). No cost increases shall be accepted in this initial contract term. Please consider this when providing pricing for this request for proposal.

2.37 Service Test Period

If the Contractor has not previously performed the services to the city, the City reserves the right to require a test period to determine if the Contractor can perform in accordance with the requirements of the contract, and to the City's satisfaction. Such test period can be from thirty to ninety days, and will be conducted under all specifications, terms and conditions contained in the contract. This trial period will then become part of the initial contract period.

A performance evaluation will be conducted prior to the end of the test period and that evaluation will be the basis for the City's decision to continue with the Contractor or to select another Contractor (if applicable).

2.38 Contract Coordinator

The City may designate a Contract Coordinator whose principal duties shall be:

- Liaison with Contractor.
- Coordinate and approve all work under the contract.
- Resolve any disputes.
- Assure consistency and quality of Contractor's performance.
- Schedule and conduct Contractor performance evaluations and document findings.
- Review and approve for payment all invoices for work performed or items delivered.

2.39 Contractor Performance Reviews and Ratings

The City Contract Coordinator may develop a Contractor performance evaluation report. This report shall be used to periodically review and rate the Contractor's performance under the contract with performance rating as follows:

| | |
|----------------|--|
| Excellent | Far exceeds requirements. |
| Good | Exceeds requirements |
| Fair | Just meets requirements. |
| Poor | Does not meet all requirements and contractor is subject to penalty provisions under the contract. |
| Non-compliance | Either continued poor performance after notice or a performance level that does not meet a significant portion of the requirements. This rating makes the Contractor subject to the default or cancellation for cause provisions of the contract. |

The report shall also list all discrepancies found during the review period. The Contractor shall be provided with a copy of the report and may respond in writing if he takes exception to the report or wishes to comment on the report. Contractor performance reviews and subsequent reports will be used in determining the suitability of contract extension.

2.40 Substitution of Personnel

It is the intention of the City that the Contractor's personnel proposed for the contract will be available for the contract term. In the event the Contractor wishes to substitute personnel, he shall propose personnel of equal or higher qualifications and all replacement personnel are subject to City approval. In the event substitute personnel are not satisfactory to the City and the matter cannot be resolved to the satisfaction of the City, the City reserves the right to cancel the Contract for cause. See Section 5.09 General Conditions.

2.41 Ownership of Work

The City shall have full ownership and the right to copyright, otherwise limit, reproduce, modify, sell, or use all the work or product produced under this contract without payment of any royalties or fees to the Contractor above the agreed hourly rates and related costs.

2.42 Condition of Trade-In Equipment – N/A

2.43 Conditions of Trade-In Shipment and Purchase Payment- N/A

2.44 Verification of Employment Status

Any Contractor/Consultant assigned to perform responsibilities under its contract with a State agency is required to utilize the US Department of Homeland Security's E-Verify system (per Executive Order Number 11-02) to verify the employment eligibility of: (a) all persons employed during the contract term by the Contractor to perform employment duties within Florida; and (b) all persons (including subcontractors) assigned by the Contractor to perform work pursuant to the contract with the State agency.

E-VERIFY Affirmation Statement must be completed and submitted with Proposer's response to this RFP.

2.45 Service Organization Control

The Contractor should provide a current SSAE 18, SOC 2, Type I report with their proposal. Awarded Contractor will be required to provide an SSAE 18, SOC 2, Type II report annually during the term of this contract. If the Contractor cannot provide the SSAE 18, SOC 2, Type I report at time of proposal submittal, a current SOC 3 report will be accepted.

2.46 Warranties of Usage

Any estimated quantities listed are for information and tabulation purposes only. No warranty or guarantee of quantities needed is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.

2.47 PCI (Payment Card Industry) Compliance – N/A

END OF SECTION

SECTION III - TECHNICAL SPECIFICATIONS/SCOPE OF SERVICES

3 BACKGROUND

The City of Fort Lauderdale is situated on the southeast coast of Florida, centrally located between Miami and Palm Beach, encompassing nearly 36 square miles, with a population of about 171,831. Fort Lauderdale is the largest of Broward County's 31 municipalities. The City was established March 27, 1911. The Form of City Government is Commission – Manager. Fort Lauderdale is a city providing citizens with a full complement of municipal services. The major services provided by the City are administration, public works, water and sewer utility, parks and recreation, planning, permitting, code enforcement, public safety police and fire and parking services.

The City of Fort Lauderdale's Enterprise Resource Planning (ERP) software system solution with Infor (US), Inc. completed "go live" on December 26, 2023. The City is currently using Infor CloudSuite with tailored modules for financial management (FSM), supply chain management (SCM), and human capital management (HCM). The City is seeking Managed Services support to improve the production support.

3.1 Project Definition:

3.1.1 The City is seeking contract managed services from an Infor certified partner for Infor CloudSuite. The Contractor shall provide application support for Infor CloudSuite various modules such as financial management, supply chain management, human capital management, BIRST analytics, and reporting. This includes assistance with Absence Management, Benefits, Performance Management, General ledger, accounts payable, and procurement.

3.2.1 Expected Work Schedule:

3.2.1.1 The City needs managed support services for approximately 25 hours per week/1300 hours per year.

3.2.1.2 The regular work schedule will be 8:00 am to 5:00 pm (Eastern Standard Time) Monday through Friday.

3.2.1.3 If additional hours are needed due to varying work assignments, those hours will be billed as incurred at the hourly rate providing in the Contract.

3.2.1.4 In compliance with the City hours of operation, the Contractor will work remotely.

3.2 Objective:

3.2.1 The primary objective of this contract is to provide application support for Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll. Managed Services will assist with the support of GHR, CloudSuite Financials (CSF), Supply Chain Management (SCM), MSCM.

3.2.2 The secondary objective of this contract is for Special Project opportunities. When the needs arise Scopes of Work will be provided on a per project basis. Awarded vendor will quote these projects based on hourly rates provided in Attachment A.

3.3 Resources:

3.3.1 INFOR Technical and Functional Resources:

3.3.1.1 These resources shall be responsible for providing technical support services for the City application software built on the Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll, Version 11.

A. These resources must have demonstrated experience in the following Infor modules and sub-modules:

1) Infor Human Capital Management

- a) Absence Management
- b) Compensation & Benefits Management
- c) Payroll
- d) Performance Management

2) Infor Financial Management

- a) Accounts Payables (AP)
- b) Accounts Receivable (AR)
- c) Asset Management
- d) General Ledger
- e) Grants Accounting
- f) Event Sourcing
- g) Treasury

3) BIRST and Reporting

- a) Dashboard and Report Development
- b) Data Visualization and Insights
- c) Reporting Framework and Scheduling

B. These resources responsibilities include production support, system integrations, vendor interfaces, reporting, Birst, security, workflows, and custom development, as needed.

C. These resources interact and provide training and support, as needed, with in-house developers, business subject matter experts, project managers, and unit managers.

3.4 Experience:

3.4.1 Shall include, but is not limited to, the following:

3.4.1.1 Proposer or principals shall have relevant experience in Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll, Version 11 and shall provide case studies or references from similar projects.

3.4.1.2 Able to assess and recommend improvements to business processes and support organizational design.

3.4.1.3 Ability to configure modules as per business processes and user requirements and development/support skills.

3.4.1.4 Communicate with stakeholders to understand business processes to translate into technical requirements and designs.

3.4.1.5 Support all go-live activities, post-production troubleshooting and analysis of business process issues.

3.4.1.6 Perform extensive business process analysis, configuring, user training and documentation.

3.4.1.7 Perform functional testing for existing modules to understand existing business processes, create documents to understand functional requirements.

3.5 This Scope of Work: This Scope of Work describes the services to be performed by an experienced, qualified, and certified contractor.

3.5.1 General Requirements:

3.5.1.1 The Contractor shall provide INFOR Resources as defined herein.

3.5.1.2 The Contractor shall have a sufficient pool of resources to meet the requirements contained herein to provide replacement and/or supplemental resources as may be necessary due to extended illness, vacation, other extended absences of the assigned resources as well as for general succession planning in the event an assigned resource is no longer employed by the Contractor.

A. An extended absence is defined as two or more weeks.

B. If resources need to be replaced either in the short term or permanently, the Contractor shall provide resumes to the City for review within three (3) days of the City request.

C. Replacement resources shall have comparable experience to those resources being replaced.

3.5.1.3 The Contractor shall provide management oversight of the resources assigned to the City, to ensure the resources are given opportunities for mentoring, continuing education and professional development training given the potential extended nature of the assignment(s).

3.5.1.4 The Contractor shall not reassign any resources assigned to the City to other clients or projects.

A. Resources assigned to the City shall be primarily dedicated to the City with limited other work assignments.

B. The assigned resources shall remain assigned to the City unless one of the following occurs:

1. The City requests the removal of the resource.

2. The resource is no longer able to perform the duties under the contract due to extended leave.

3. The resource is no longer employed by the Contractor.

3.5.1.5 The Contractor shall provide a primary point of contact to discuss performance issues, to schedule work and other contractual matters.

3.5.1.6 The Contractor shall meet with the City on a quarterly basis to review program status, performance issues, and another contract matters as needed.

3.5.2 Provide Technical and Production Support:

- 3.5.2.1 Services:** Provide technical and production support for Infor CloudSuite HCM, Payroll, Financials, and Supply Management.
 - 3.5.2.2 Deliverables:** Provide and deliver reliable, effective, and efficient technical support for Infor CloudSuite HCM, Financials and Supply Management.
- 3.5.3 Collaborate with the City Staff:**
 - 3.5.3.1 Services:** Collaborate with the City IT staff and business users to evaluate requirements and develop technical solutions using Landmark tools of Configuration Console, ION, IPA, ISD, BI and Birst.
 - 3.5.3.2 Deliverables:** Provide and deliver reliable, effective, and collaborative support with the City staff and business partners in developing technical solutions according to specifications.
- 3.5.4 CloudSuite HCM Application Troubleshoot and Resolve Issues:**
 - 3.5.4.1 Services:** Troubleshoot and resolve CloudSuite HCM application issues related to HR, Benefits, Payroll, Recruitment, Absence Management, Time and Attendance, other related applications, and related interfaces.
 - 3.5.4.2 Deliverables:** Provide and deliver reliable, effective, and efficient troubleshooting support and resolution techniques in supporting HCM business processes related to Absence Management, Performance Management, Recruitment, Benefits enrollment, COLA, Time and Attendance, Payroll processing, Compensation, and vendor interfaces.
- 3.5.5 CloudSuite Financials Troubleshoot and Resolve Issues:**
 - 3.5.5.1 Services:** Troubleshoot and resolve CloudSuite Financials and Supply Management issues related to Requisitions, General Ledger, Accounts Payable, Strategic Sourcing-Purchasing and Events, Supplier Portal, Contracts, Budget Control, Inventory, Warehouse, and Close Management.
 - 3.5.5.2 Deliverables:** Provide and deliver reliable, effective, and efficient troubleshooting support and resolution techniques in supporting CloudSuite Financials and Supply Management business processes such as month end close, PO dispatch, contract management, AP check run, invoice matching, replenishment, receiving, journals, budget load, PO rollover, year-end processes, and vendor interfaces.
- 3.5.6 BIRST Analytics and Reporting:**
 - 3.5.6.1 Services:** Collaborate with application support team and business users to develop ad-hoc dashboards and reports using listview configurations, dashboards, ISD, BI and Birst.
 - 3.5.6.2 Deliverables:** Provide and deliver reliable, efficient, and effective ad-hoc dashboards and reports according to required specifications.
- 3.5.7 Integrations:**

- 3.5.7.1 Services:** Develop and maintain integrations with internal and external systems. Monitor scheduled jobs, processes, BODs, IPAs, and system interfaces in Async.
 - 3.5.7.2 Deliverables:** Develop integrations with internal and external systems according to specifications.
 - A.** The City is responsible for communicating the requirements, the firm will need to outline functional and technical specifications.
- 3.5.8 Configurations:**
 - 3.5.8.1 Services:** Design, develop, test, debug, and deploy customizations and interfaces to meet business requirements using Configuration Console, IPA, and ION.
 - 3.5.8.2 Deliverables:** Provide and deliver reliable, efficient, and effective application maintenance, system configurations, and interfaces.
- 3.5.9 Review and Testing:**
 - 3.5.9.1 Services:** Assist in the review and testing of monthly patches and bi-annual Critical Updates.
 - 3.5.9.2 Deliverables:** Provide effective and efficient support in the review, update, and testing of monthly patches and bi-annual Critical Updates.

3.6 Special Project Title: Infor Absence Management Post-Go-Live Audit

3.6.1 Project Overview:

- 3.6.1 Project Overview.**
 - 3.6.1.1** This project entails conducting a comprehensive audit of the Infor Absence Management system following its go-live deployment. The objective is to validate that the application functions as intended, verify configurations, identify any issues, and ensure smooth operation in line with business requirements.
- 3.6.2 Project Goals:**
 - 3.6.2.1** Validate that the Infor Absence Management system is configured correctly and functioning as designed.
 - 3.6.2.2** Identify and rectify any missed configurations or issues post-deployment.
 - 3.6.2.3** Ensure compliance with organizational policies and regulatory requirements.
 - 3.6.2.4** Provide a report summarizing findings, recommendations, and action plans.
- 3.6.3 Scope of Work:**
 - 3.6.3.1** Pre-Audit Preparation
 - 3.6.3.2** Review project documentation including deployment plans, configuration settings, and user requirements.
 - 3.6.3.3** Schedule and coordinate audit activities with relevant stakeholders.

3.6.4 Configuration Verification:

3.6.4.1 Verify system configurations against established specifications.

3.6.4.2 Confirm the setup of absence policies, accruals, and reporting functions.

3.6.4.3 Ensure integrations with other systems (e.g., payroll, HRIS) are functioning as intended.

3.6.5 Functional Testing:

3.6.5.1 Conduct end-to-end testing of core functionalities, including absence requests, approvals, and reporting.

3.6.5.2 Test user roles and permissions to ensure appropriate access levels.

3.6.5.3 Validate data integrity across the system.

3.6.6 Issue Identification

3.6.6.1 Document any discrepancies, issues, or errors encountered during testing.

3.6.6.2 Assess system performance, including response times and load handling.

3.6.7 Stakeholder Interviews:

3.6.7.1 Conduct interviews with key users and stakeholders to gather feedback on system usability and functionality.

3.6.7.2 Identify any additional requirements or desired enhancements.

3.6.8 Reporting and Recommendations:

3.6.8.1 Compile a comprehensive audit report detailing findings, issues, and suggested remediation steps.

3.6.8.2 Provide recommendations for ongoing monitoring and maintenance of the system.

3.6.8.3 Present findings to stakeholders and discuss the proposed action plan.

3.6.9 Deliverables:

3.6.9.1 Pre-Audit Preparation Document

3.6.9.2 Configuration Verification Checklist

3.6.9.3 Functional Testing Results

3.6.9.4 Audit Findings Report

3.6.9.5 Recommendations and Action Plan

END OF SECTION

SECTION IV – SUBMITTAL REQUIREMENTS

4.1 Instructions

4.1.1 The City of Fort Lauderdale uses its own on-line strategic sourcing platform to administer the competitive solicitation process, including but not limited to soliciting proposals, issuing addenda, responding to questions / requests for information. There is no charge to register and download the RFP from the City's on-line strategic sourcing platform. Proposers are strongly encouraged to read the supplier tutorial available in the City's on-line strategic sourcing platform well in advance of their intention of submitting a proposal to ensure familiarity with the use of the City's on-line strategic sourcing platform. The City shall not be responsible for a Proposer's inability to submit a proposal by the end date and time for any reason, including issues arising from the use of the City's on-line strategic sourcing platform.

4.1.2 Careful attention must be given to all requested items contained in this RFP. Proposers are invited to submit proposals in accordance with the requirements of this RFP. Please read entire solicitation before submitting a proposal. Proposers must provide a response to each requirement of the RFP. Proposals should be prepared in a concise manner with an emphasis on completeness and clarity. Notes, exceptions, and comments may be rendered on an attachment, provided the same format of this RFP text is followed.

4.1.3 All information submitted by Proposer shall be typewritten or provided as otherwise instructed to in the RFP. Proposers shall use and submit any applicable or required forms provided by the City and attach such to their proposal. Failure to use the forms may cause the proposal to be rejected and deemed non-responsive.

IN THE EVENT OF ANY CONFLICT OR DISCREPANCY BETWEEN BID/PROPOSAL PRICE(S) SUBMITTED BY BIDDER/PROPOSER ELECTRONICALLY INTO THE CITY'S ON-LINE STRATEGIC SOURCING PLATFORM UNIT PRICE FIELD(S), ANY OTHER FORMS OR ATTACHMENTS (WHETHER PART OF THE CITY'S SOLICITATION DOCUMENTS OR DOCUMENTS CREATED AND UPLOADED BY THE BIDDER/PROPOSER), OR ANOTHER SECTION/FIELD OF THE SYSTEM, THE ONLINE UNIT PRICE(S) INPUTTED ELECTRONICALLY INTO THE SYSTEM BY BIDDER/PROPOSER SHALL GOVERN.

4.1.4 Proposals shall be submitted by an authorized representative of the firm. Proposals must be submitted in the business entities name by the President, Partner, Officer or Representative authorized to contractually bind the business entity. Proposals shall include an attachment evidencing that the individual submitting the proposal, does in fact have the required authority stated herein.

4.1.5 All proposals will become the property of the City. The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters, or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes. Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and

that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the Proposer agrees to defend, indemnify, and hold harmless the city and the city's officers, employees, and agent, against any loss or damages incurred by any person or entity as a result of the city's treatment of records as public records. In the event of Contract award, all documentation produced as part of the Contract shall become the exclusive property of the City.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT PRRCONTRACT@FORTLAUDERDALE.GOV, 954-828-5002, CITY CLERK'S OFFICE, ONE EAST BROWARD BOULEVARD, SUITE 444, FORT LAUDERDALE, FLORIDA 33301.

Contractor shall:

1. Keep and maintain public records required by the City in order to perform the service.
 2. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes (2024), as may be amended or revised, or as otherwise provided by law.
 3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of this contract if the Contractor does not transfer the records to the City.
 4. Upon completion of the Contract, transfer, at no cost, to the City all public records in possession of the Contractor or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of this Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of this Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.
- 4.1.6** By submitting a response Proposer is confirming that the firm has not been placed on the convicted vendors list as described in Section §287.133 (2) (a) Florida Statutes; that the only person(s), company or parties interested in the proposal as principals are named therein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that the signer of the proposal has full authority to bind the firm.

4.2 Contents of the Proposal

The City deems certain documentation and information important in the determination of responsiveness and for the purpose of evaluating proposals. Proposals should seek to avoid information in excess of that requested, must be concise, and must specifically address the issues of this RFP. The City prefers that proposals be no more than 100 pages in one complete pdf document. The proposals should be organized, divided, and indexed into the sections indicated herein. These are not inclusive of all the information that may be necessary to properly evaluate the proposal and meet the requirements of the scope of work and/or specifications. Additional documents and information should be provided as deemed appropriate by the respondent in proposal to specific requirements stated herein or through the RFP.

4.2.1 Table of Contents

The table of contents should outline in sequential order the major areas of the submittal, including enclosures. All pages should be consecutively numbered and correspond to the Table of Contents.

4.2.2 Executive Summary

Each Offeror must submit an executive summary that identifies the business entity, its background, main office(s), and office location that will service this contract. Identify the officers, principals, supervisory staff, and key individuals who will be directly involved with the work and their office locations. The executive summary should also summarize the key elements of the proposal.

4.2.3 Experience and Qualifications

Indicate the firm's number of years of experience in providing the professional services as it relates the work contemplated. Provide details of past projects for agencies of similar size and scope, including information on your firm's ability to meet time and budget requirements. Indicate the firm's initiatives towards its own sustainable business practices that demonstrate a commitment to conservation. Indicate business structure, IE: Corp., Partnership, LLC. Firm should be registered as a legal entity in the State of Florida; Minority or Woman owned Business (if applicable); Company address, phone number, fax number, E-Mail address, web site, contact person(s), etc. Relative size of the firm, including management, technical and support staff; licenses and any other pertinent information shall be submitted.

4.2.4 Approach to Scope of Work

Provide in concise narrative form, your understanding of the City's needs, goals and objectives as they relate to the project, and your overall approach to accomplishing the project. Give an overview on your proposed vision, ideas, and methodology. Describe your proposed approach to the project.

As a part of the response, a design plan and diagram(s) shall be presented to the City for approval.

The Proposer shall also propose a scheduling methodology (timeline) for effectively managing and executing the work in the optimum time. The delivery time shall be stated in calendar days from the date of City notification of award or notice to proceed with delivery. Such timeline information and proposed dates shall include, but not necessarily be limited to: delivery, installation, acceptance testing, personnel, and other related completion dates, in accordance with the RFP specifications.

NOTE: The project must be completed and accepted within 120 days from the City Notice to Proceed.

Also provide information on your firm's current workload and how this project will fit into your workload. Describe available facilities, technological capabilities, and other available resources you offer for the project.

Additionally, the proposal should specifically address:

- A. Who
- B. What
- C. When
- D. Where
- E. Why
- F. How

4.2.5 References

Provide at least three references, preferably government agencies, for projects with similar scope as listed in this RFP. Information should include:

- Client Name, address, contact person telephone and E-mail addresses.
- Description of work.
- Year the project was completed.
- Total cost of the project, estimated and actual.

Note: Do not include City of Fort Lauderdale work or staff as references to demonstrate your capabilities. The Committee is interested in work experience and references other than the City of Fort Lauderdale.

4.2.6 Minority/Women (M/WBE) Participation

If your firm is a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act of 1985, provide copies of your certification(s). If your firm is not a certified M/WBE, describe your company's previous efforts, as well as planned efforts in meeting M/WBE procurement goals under Florida Statutes 287.09451.

4.2.7 Subcontractors

Proposer must clearly identify any subcontractors that may be utilized during the term of this contract.

4.2.8 Required Forms

A. Proposal Certification

Complete and attach the Proposal Certification provided herein.

B. Cost Proposal

Provide firm, fixed, costs for all services/products using the form provided in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

C. Non-Collusion Statement

This form is to be completed, if applicable, and inserted in this section.

D. Non-Discrimination Certification Form

This form is to be completed and inserted in this section.

E. Local Business Preference (LBP)

This form is to be completed, if applicable, and inserted in this section.

F. Disadvantaged Business Enterprise Preference (DBEP)

This form is to be completed, if applicable, and inserted in this section.

G. Contract Payment Method

This form must be completed and returned with your proposal. Proposers must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

H. E-Verify Affirmation Statement

This form must be completed and returned with your proposal.

I. Sample Insurance Certificate

Demonstrate your firm's ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for the required coverage and limits.

J. W-9 for Proposing Firm

This form must be completed and returned with your proposal.

K. Active Status Page from Division of Corporations – Sunbiz.org

Provide PDF of current page with your proposal.

L. Signing Authority

Proposals shall include an attachment evidencing that the individual submitting the proposal, does in fact have the required authority.

END OF SECTION

SECTION V – EVALUATION AND AWARD

5.1 Evaluation Procedure

5.1.1 Bid/Proposal Tabulations/Intent to Award

Notice of Intent to Award Contract/Bid, resulting from the City's Formal solicitation process may be found at: [Click Here](#). Tabulations of receipt of those parties responding to a formal solicitation may be found at: [Click Here](#). Any interested party may call the Procurement Services Division at 954-828-5933, or email ProcurementSupport@fortlauderdale.gov, for more information.

5.1.2 Evaluation of proposals will be conducted by an Evaluation Committee, consisting of a minimum of three members of City Staff, or other persons selected by the City Manager or designee. All committee members must be in attendance at scheduled evaluation meetings. Proposals shall be evaluated based upon the information and references contained in the responses as submitted.

5.1.3 The Committee may short list Proposals that it deems best satisfy the weighted criteria set forth herein. The committee may then conduct interviews and/or require oral presentations from the short-listed Proposers. The Evaluation Committee shall then re-score and re-rank the short-listed firms in accordance with the weighted criteria.

5.1.4 The City may require visits to the Proposer's facilities to inspect record keeping procedures, staff, facilities and equipment as part of the evaluation process.

5.1.5 The final ranking and the Evaluation Committee's recommendation may then be reported to the City Manager for consideration of contract award.

5.2 Evaluation Criteria

5.2.1 The City uses a mathematical formula to determine the scoring for each individual responsive and responsible firm based on the weighted criteria stated herein. Each evaluation committee member will rank each firm by criteria, giving their first ranked firm a number 1, the second ranked firm a number 2, and so on. The City shall multiply that average ranking by the weighted criterion identified herein to determine the total the points for each Proposer. The lowest average final ranking score will determine the recommendation by the evaluation committee to the City Manager.

5.2.2 Weighted Criteria

| | |
|---|------|
| Demonstrates understanding, project approach, and overall ability to meet and/or exceed the requirements. | 35% |
| Credentials, related experience, references and financial stability of the firm as well as the related experience of key personnel to be assigned | 25% |
| Overall quality and completeness of proposal | 10% |
| Total Project Cost | 30% |
| TOTAL PERCENT AVAILABLE: | 100% |

5.3 Contract Award

The City reserves the right to award a contract to that Consultant who will best serve the interest of the City. The City reserves the right, based upon its deliberations and in its opinion, to accept or reject any or all proposals. The City also reserves the right to waive minor irregularities or variations of the submittal requirements and RFP process.

END OF SECTION

SECTION VI - COST PROPOSAL PAGE

Proposer's Name: _____

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Contractor shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Hourly Price - Annual Managed Supports Services...

- 1) Estimated 25 hrs. per week / 1300 hrs. per year. \$ _____ /HR
- 2) Year 3 - % Increase on Hourly Rate _____%
- 3) Year 4 - % Increase on Hourly Rate _____%

Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

- 4) Estimated 30 hrs. per week / 1560 hours per year \$ _____ /HR
- 5) Estimated 33 hrs. per week / 1716 hours per year \$ _____ /HR
- 6) Estimated 35 hrs. per week / 1820 hours per year \$ _____ /HR
- 7) Estimated 40 hrs. per week / 2080 hours per year \$ _____ /HR
- 8) **Special Project #1:**
Infor Absence Management Post-Go-Live Audit \$ _____ Lump Sum
Proposers shall attach a separate quote with pricing breakdown by Title/ Role.
- 9) The City of Fort Lauderdale may, at its discretion, choose to amend the contract with the Contractor for additional services for Special Projects. Please include an additional list of all Titles/Roles and their hourly rates on the attached Excel, **Attachment A**.

Submitted by:

Name (printed)

Signature

Date

Title

E380 - EXHIBIT A

| EVENT 380 - SPECIAL PROJECTS | | | | NAME OF FIRM: | | | CITY OF FORT LAUDERDALE ADDITIONAL PRICING PROPOSAL PAGE | | | |
|------------------------------|------------|-----------|---------------------------|---------------|-----|----------------------------------|---|----------------------|----------------------|----------------------|
| No. | First Name | Last Name | Title/Role/Classification | Prime | Sub | Years Experience in this Role | UOM | Rates Years 1 & 2 | % Increase Year 3 | % Increase Year 4 |
| 1 | | | | | | | Hourly | \$ - | 0% | 0% |
| 2 | | | | | | | Hourly | \$ - | 0% | 0% |
| 3 | | | | | | | Hourly | \$ - | 0% | 0% |
| 4 | | | | | | | Hourly | \$ - | 0% | 0% |
| 5 | | | | | | | Hourly | \$ - | 0% | 0% |
| 6 | | | | | | | Hourly | \$ - | 0% | 0% |
| 7 | | | | | | | Hourly | \$ - | 0% | 0% |
| 8 | | | | | | | Hourly | \$ - | 0% | 0% |
| 9 | | | | | | | Hourly | \$ - | 0% | 0% |
| 10 | | | | | | | Hourly | \$ - | 0% | 0% |
| 11 | | | | | | | Hourly | \$ - | 0% | 0% |
| 12 | | | | | | | Hourly | \$ - | 0% | 0% |
| 13 | | | | | | | Hourly | \$ - | 0% | 0% |
| 14 | | | | | | | Hourly | \$ - | 0% | 0% |
| 15 | | | | | | | Hourly | \$ - | 0% | 0% |

*Add additional lines as needed.

**CITY OF FORT LAUDERDALE
GENERAL CONDITIONS**

These instructions and conditions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Procurement Services Division. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement. In this general conditions document, Invitation to Bid (ITB), Request for Qualifications (RFQ), and Request for Proposal (RFP) are interchangeable.

PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:

- 1.01 **BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 **DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 **PACKING SLIPS:** It will be the responsibility of the awarded Contractor, to attach all packing slips to the OUTSIDE of each shipment. Packing slips must provide a detailed description of what is to be received and reference the City of Fort Lauderdale purchase order number that is associated with the shipment. Failure to provide a detailed packing slip attached to the outside of shipment may result in refusal of shipment at Contractor's expense.
- 1.04 **PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 45 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.05 **TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.06 **BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of one hundred twenty (120) days from the date of bid opening unless otherwise stated in the ITB.
- 1.07 **VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.
- By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared by the City as conditional.
- 1.08 **NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.09 **MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.
- Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.
- The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.
- Women Business Enterprise (WBE) a "Women Owned or Controlled Business" is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.
- Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.
- BLACK, which includes persons having origins in any of the Black racial groups of Africa.
- WHITE, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.
- HISPANIC, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.
- NATIVE AMERICAN, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.
- ASIAN AMERICAN, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

1.10 **MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION**

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and

procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties have to be identified in the proposal. If a proposer is considered for award, he or she will be asked to meet with City staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

1.11 SCRUTINIZED COMPANIES

As a condition precedent to the effectiveness of this Agreement, subject to *Odebrecht Construction, Inc., v. Prasad*, 876 F.Supp.2d 1305 (S.D. Fla. 2012), *affirmed*, *Odebrecht Construction, Inc., v. Secretary, Florida Department of Transportation*, 715 F.3d 1268 (11th Cir. 2013), with regard to the "Cuba Amendment," the Contractor certifies that it is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and that it does not have business operations in Cuba or Syria, as provided in section 287.135, Florida Statutes (2023), as may be amended or revised. As a condition precedent to any contract for goods or services of any amount and as a condition precedent to the renewal of any contract for goods or services of any amount, the Contractor certifies that it is not on the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2023), and that it is not engaged in a boycott of Israel. The City may terminate this Agreement at the City's option if the Contractor is found to have submitted a false certification as provided under subsection (5) of section 287.135, Florida Statutes (2023), as may be amended or revised, or been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2023), as may be amended or revised, or is engaged in a boycott of Israel, or has been engaged in business operations in Cuba or Syria, as defined in Section 287.135, Florida Statutes (2023), as may be amended or revised.

1.12 DEBARRED OR SUSPENDED BIDDERS OR PROPOSERS

The bidder or proposer certifies, by submission of a response to this solicitation, that neither it nor its principals and subcontractors are presently debarred or suspended by any Federal department or agency.

Part II DEFINITIONS/ORDER OF PRECEDENCE:

2.01 BIDDING DEFINITIONS The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:

INVITATION TO BID (ITB) The solicitation document used for soliciting competitive sealed bids for goods or services.

INVITATION TO NEGOTIATE (ITN) All solicitation documents, regardless of medium, whether attached to or incorporated by reference in solicitations for responses from firms that invite proposals from interested and qualified firms so the city may enter into negotiations with the firm(s) determined most capable of providing the required goods or services.

REQUEST FOR PROPOSALS (RFP) A solicitation method used for soliciting competitive sealed proposals to determine the best value among proposals for goods or services for which price may not be the prevailing factor in award of the contract, or the scope of work, specifications or contract terms and conditions may be difficult to define. Such solicitation will consider the qualifications of the proposers along with evaluation of each proposal using identified and generally weighted evaluation criteria. RFPs may include price criteria whenever feasible, at the discretion of the city.

REQUEST FOR QUALIFICATIONS (RFQ) A solicitation method used for requesting statements of qualifications in order to determine the most qualified proposer for professional services.

BID – a price and terms quote received in response to an ITB.

PROPOSAL – a proposal received in response to an RFP.

BIDDER – Person or firm submitting a Bid.

PROPOSER – Person or firm submitting a Proposal.

RESPONSIVE BIDDER – A firm who has submitted a bid, offer, quote, or response which conforms in all material respects to the competitive solicitation document and all of its requirements.

RESPONSIBLE BIDDER – A firm who is fully capable of meeting all requirements of the solicitation and subsequent contract. The respondent must possess the full capability, including financial and technical, ability, business judgment, experience, qualifications, facilities, equipment, integrity, capability, and reliability, in all respects to perform fully the contract requirements and assure good faith performance as determined by the city.

FIRST RANKED PROPOSER – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.

SELLER – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.

CONTRACTOR – Any firm having a contract with the city. Also referred to as a "Vendor".

CONTRACT – All types of agreements, including purchase orders, for procurement of supplies, services, and construction, regardless of what these agreements may be called.

CONSULTANT – A firm providing professional services for the city.

2.02 SPECIAL CONDITIONS: Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

PART III BIDDING AND AWARD PROCEDURES:

3.01 SUBMISSION AND RECEIPT OF BIDS: To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidders should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten, or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.

3.02 MODEL NUMBER CORRECTIONS: If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.

- 3.03 **PRICES QUOTED:** Deduct trade discounts and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 **TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.
- 3.05 **WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 **APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.
- 3.07 **MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Division immediately. Such notification must be received by the Procurement Services Division prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 **MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 **SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 **LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 **BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.
- 3.12 **USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 **QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Procurement Director reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 **BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond or cashier's check. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 **PUBLIC RECORDS/TRADE SECRETS/COPYRIGHT:** The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes.

Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as public records. In addition, the proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as exempt from disclosure or confidential. Proposals bearing copyright symbols or otherwise purporting to be subject to copyright protection in full or in part may be rejected. The proposer authorizes the City to publish, copy, and reproduce any and all documents submitted to the City bearing copyright symbols or otherwise purporting to be subject to copyright protection.

EXCEPT FOR CLEARLY MARKED PORTIONS THAT ARE BONA FIDE TRADE SECRETS PURSUANT TO FLORIDA LAW, DO NOT MARK YOUR RESPONSE TO THE RFP AS PROPRIETARY OR CONFIDENTIAL. DO NOT MARK YOUR RESPONSE TO THE RFP OR ANY PART THEREOF AS COPYRIGHTED.

- 3.16 PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm who has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.
- 3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.

If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.

- 3.18 LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.
- 3.19 BID PROTEST PROCEDURE:** Any proposer or bidder who is not recommended for award of a contract and who alleges a failure by the city to follow the city's procurement ordinance or any applicable law may protest to the chief procurement officer, by delivering a letter of protest to the director of finance within five (5) days after a notice of intent to award is posted on the city's web site at the following url: <https://www.fortlauderdale.gov/departments/finance/procurement-services/notices-of-intent-to-award>

The complete protest ordinance may be found on the city's web site at the following url:
https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeid=coor_ch2ad_artvfi_div2pr_s2-182direpr

PART IV BONDS AND INSURANCE

- 4.01 PERFORMANCE BOND:** If a performance bond is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond, payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. The Performance Bond must be executed by a surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

- 4.02 INSURANCE:** The Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Procurement Services Division original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an **ADDITIONAL INSURED for General Liability Insurance** and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting the bid, agrees to abide by such modifications.

PART V PURCHASE ORDER AND CONTRACT TERMS:

- 5.01 COMPLIANCE WITH SPECIFICATIONS, LATE DELIVERIES/PENALTIES:** Items offered may be tested for compliance with bid specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:
- Bidder's name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
 - All City Departments being advised to refrain from doing business with the Bidder.
 - All other remedies in law or equity.
- 5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.
- 5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended.

- 5.04 **ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.
- 5.05 **OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.
- 5.06 **VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.
- 5.07 **INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.
- 5.08 **INDEMNITY/HOLD HARMLESS AGREEMENT:** Contractor shall protect and defend at Contractor's expense, counsel being subject to the City's approval, and indemnify and hold harmless the City and the City's officers, employees, volunteers, and agents from and against any and all losses, penalties, fines, damages, settlements, judgments, claims, costs, charges, expenses, or liabilities, including any award of attorney fees and any award of costs, in connection with or arising directly or indirectly out of any act or omission by the Contractor or by any officer, employee, agent, invitee, subcontractor, or sublicensee of the Contractor. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.
- 5.09 **TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.
- 5.10 **TERMINATION FOR CONVENIENCE:** The City reserves the right, in the City's best interest as determined by the City, to cancel any contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 **CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 **RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The Contractor agrees to make available to the City Auditor or the City Auditor's designee, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports, and records relating to this contract. The Contractor shall retain all books of account, reports, and records relating to this contract for the duration of the contract and for three years after the final payment under this Agreement, until all pending audits, investigations or litigation matters relating to the contract are closed, or until expiration of the records retention period prescribed by Florida law or the records retention schedules adopted by the Division of Library and Information Services of the Florida Department of State, whichever is later.
- 5.13 **PERMITS, TAXES, LICENSES:** The successful Contractor shall, at his/her/its own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 **LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- NON-DISCRIMINATION:** The Contractor shall not, in any of its activities, including employment, discriminate against any individual on the basis of race, color, national origin, age, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, marital status, or any other protected classification as defined by applicable law.
1. The Contractor certifies and represents that the Contractor will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, (2019), as may be amended or revised, ("Section 2-187"), during the entire term of this Agreement.
 2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
 3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
 4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
 5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.
- 5.15 **UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:

1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve Contractor of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying Contractor from receiving any business from the City for a stated period of time.

If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.

- 5.16 **ELIGIBILITY:** If applicable, the Contractor must first register with the Florida Department of State in accordance with Florida Statutes, prior to entering into a contract with the City.
- 5.17 **PATENTS AND ROYALTIES:** The Contractor, without exception, shall defend, indemnify, and hold harmless the City and the City's employees, officers, employees, volunteers, and agents from and against liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including their use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include any and all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.18 **ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.19 **GOVERNING LAW; VENUE:** The Contract shall be governed by and construed in accordance with the laws of the State of Florida. Venue for any lawsuit by either party against the other party or otherwise arising out of the Contract, and for any other legal proceeding, shall be in the courts in and for Broward County, Florida, or in the event of federal jurisdiction, in the Southern District of Florida.
- 5.20 **PUBLIC RECORDS:**

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT CITY CLERK'S OFFICE, ONE EAST BROWARD BOULEVARD, SUITE 444, FORT LAUDERDALE, FLORIDA 33301, 954-828-5002, PRRCONTRACT@FORTLAUDERDALE.GOV.

Contractor shall comply with public records laws, and Contractor shall:

1. Keep and maintain public records required by the City to perform the service.
2. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes (2019), as may be amended or revised, or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Contractor does not transfer the records to the City.
4. Upon completion of the Contract, transfer, at no cost, to the City all public records in possession of the Contractor or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.



NON-COLLUSION STATEMENT

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g., ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents, and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME

RELATIONSHIPS

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

Authorized Signature

Title

Name (Printed)

Date



**CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH
NON-DISCRIMINATION PROVISIONS OF THE CONTRACT**

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-17(a)(i)(ii), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

- A. Contractors doing business with the City shall not discriminate against their employees based on the employee's race, color, religion, gender (including identity or expression), marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law:

Contracts. Every Contract exceeding \$100,000, or otherwise exempt from this section shall contain language that obligates the Contractor to comply with the applicable provisions of this section.

The Contract shall include provisions for the following:

- (i) The Contractor certifies and represents that it will comply with this section during the entire term of the contract.
- (ii) The failure of the Contractor to comply with this section shall be deemed to be a material breach of the contract, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.

Authorized Signature

Print Name and Title

Date



CONTRACT PAYMENT METHOD

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale to receive your payments fast and safely. No more waiting for checks to be printed and mailed.

In accordance with the contract, payments on this contract will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, bidders must presently have the ability to accept the credit card or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

All costs associated with the Contractor's participation in this purchasing program shall be borne by the Contractor. The City reserves the right to revise this program as necessary.

By signing below, you agree with these terms.

Please indicate which credit card payment you prefer:

____ MasterCard

____ Visa

Company Name

Name (Printed)

Signature

Title

Date



CONTRACT PAYMENT METHOD

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale to receive your payments fast and safely. No more waiting for checks to be printed and mailed.

In accordance with the contract, payments on this contract will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, bidders must presently have the ability to accept the credit card or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

All costs associated with the Contractor's participation in this purchasing program shall be borne by the Contractor. The City reserves the right to revise this program as necessary.

By signing below, you agree with these terms.

Please indicate which credit card payment you prefer:

_____ MasterCard

_____ Visa

Company Name

Name (Printed)

Signature

Title

Date



LOCAL BUSINESS PREFERENCE

Section 2-199.2, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-12-04), provides for a local business preference.

In order to be considered for a local business preference, a bidder must include the Local Business Preference Certification Statement of this ITB, as applicable to the local business preference class claimed **at the time of bid submittal**.

Upon formal request of the City, based on the application of a Local Business Preference the Bidder shall, within ten (10) calendar days, submit the following documentation to the Local Business Preference Class claimed:

- A) Copy of City of Fort Lauderdale current year business tax receipt, or Broward County current year business tax receipt, and
- B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the local business preference.

THE COMPLETE LOCAL BUSINESS PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:

https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2_AD_ARTVFI_DIV2PR_S2-186LOBUPR

Definitions: The term "Business" shall mean a person, firm, corporation or other business entity which is duly licensed and authorized to engage in a particular work in the State of Florida. Business shall be broken down into four (4) types of classes:

1. Class A Business – shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City and shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
2. Class B Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City or shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
3. Class C Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of Broward County.
4. Class D Business – shall mean any Business that does not qualify as either a Class A, Class B, or Class C business.



LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local business price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

- (1) _____ is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the City of Fort Lauderdale current year Business Tax Receipt and a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (2) _____ is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Business Tax Receipt or a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (3) _____ is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (4) _____ requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (5) _____ requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (6) _____ is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186 and does not qualify for Local Preference consideration.
- Business Name

BIDDER'S COMPANY: _____

AUTHORIZED COMPANY PERSON: _____

| | | |
|------------|-----------|------|
| PRINT NAME | SIGNATURE | DATE |
|------------|-----------|------|



DISADVANTAGED BUSINESS ENTERPRISE (DBE) PREFERENCE

Section 2-185, Code of Ordinances of the City of Fort Lauderdale, provides for a disadvantaged business preference.

In order to be considered for a DBE Preference, a bidder must include a certification from a government agency, as applicable to the DBE Preference class claimed at the time of bid submittal.

Upon formal request of the City, based on the application of a DBE Preference the Bidder shall, within ten (10) calendar days, submit the following documentation to the DBE Class claimed:

- A) Copy of City of Fort Lauderdale current year business tax receipt, or Broward County current year business tax receipt, or State of Florida active registration and/or
- B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the disadvantaged business preference.

THE COMPLETE DBE PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: <https://www.fortlauderdale.gov/home/showpublisheddocument?id=56883>

Definitions

- a. The term "disadvantaged class 1 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- b. The term "disadvantaged class 2 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with a full-time employees and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- c. The term "disadvantaged class 3 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- d. The term "disadvantaged class 4 enterprise" shall mean any disadvantaged business enterprise that does not qualify as a Class A, Class B, or Class C business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.



DISADVANTAGED BUSINESS ENTERPRISE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the disadvantaged business enterprise price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this solicitation. Violation of the foregoing provision may result in contract termination.

- (1) is a disadvantaged class 1 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (2) is a disadvantaged class 2 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with a full-time employee(s) and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (3) is a disadvantaged class 3 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (4) is a disadvantaged class 4 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that does not qualify as a Class A, Class B, or Class C business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (5) is not considered a Disadvantaged Enterprise Business as defined in the City of Fort Lauderdale Ordinance Sec.2-185 and does not qualify for DBE Preference consideration.

Business Name

BIDDER'S COMPANY: _____

AUTHORIZED COMPANY PERSON: _____
PRINT NAME SIGNATURE DATE



E-VERIFY AFFIRMATION STATEMENT

Solicitation/Bid /Contract No: _____

Project Description: _____

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- A. all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- B. all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name: _____

Authorized Company Person's Signature: _____

Authorized Company Person's Title: _____

Date: _____



REFERENCES

A minimum of three (3) references shall be provided. It is the responsibility of the Bidder/ Proposer to ensure that the information provided is accurate and current. The City may find your firm non-responsive for providing wrong and or outdated information. Additional references may be provided on a separate page.

Company Name: _____
Address: _____
Contact Person: _____
Title: _____
Phone #: _____
Email: _____
Contract Value: _____
Year(s): _____
Description: _____

Company Name: _____
Address: _____
Contact Person: _____
Title: _____
Phone #: _____
Email: _____
Contract Value: _____
Year(s): _____
Description: _____

Company Name: _____
Address: _____
Contact Person: _____
Title: _____
Phone #: _____
Email: _____
Contract Value: _____
Year(s): _____
Description: _____

CITY OF FORT LAUDERDALE BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder/proposer to ensure that their response is submitted electronically through the City's on-line strategic sourcing platform prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) _____ EIN (Optional): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____ FAX No.: _____ Email: _____

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): _____

Total Bid Discount (section 1.05 of General Conditions): _____

Check box if your firm qualifies for DBE (section 1.09 of General Conditions): ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

| Addendum No. | Date Issued | Addendum No. | Date Issued | Addendum No. | Date Issued | Addendum No. | Date Issued |
|--------------|-------------|--------------|-------------|--------------|-------------|--------------|-------------|
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A.

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Name (printed)

Signature

Date

Title

AFFIDAVIT OF COMPLIANCE WITH FOREIGN ENTITY LAWS
(Florida Statute- §287.138, 692.201, 692.202, 692.203, and 692.204)

The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury as follows:

1. Entity is not owned by the government of a foreign country of concern as defined in Section 287.138, Florida Statutes. (Source: § 287.138(2)(a), Florida Statutes)
2. The government of a foreign country of concern does not have a controlling interest in Entity. (Source: § 287.138(2)(b), Florida Statutes)
3. Entity is not organized under the laws of, and does not have a principal place of business in, a foreign country of concern. (Source: § 287.138(2)(c), Florida Statutes)
4. Entity is not owned or controlled by the government of a foreign country of concern, as defined in Section 692.201, Florida Statutes. (Source: § 288.007(2), Florida Statutes)
5. Entity is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Section 692.201, Florida Statutes, or a subsidiary of such entity. (Source: § 288.007(2), Florida Statutes)
6. Entity is not a foreign principal, as defined in Section 692.201, Florida Statutes. (Source: § 692.202(5)(a)(I), Florida Statutes)
7. Entity is in compliance with all applicable requirements of Sections 692.202, 692.203, and 692.204, Florida Statutes.
8. ***(Only applicable if purchasing real property)*** Entity is not a foreign principal prohibited from purchasing the subject real property. Entity is either (a) not a person or entity described in Section 692.204(1)(a), Florida Statutes, or (b) authorized under Section 692.204(2), Florida Statutes, to purchase the subject property. Entity is in compliance with the requirements of Section 692.204, Florida Statutes. (Source: §§ 692.203(6)(a), 692.204(6)(a), Florida Statutes)
9. The undersigned is authorized to execute this affidavit on behalf of Entity.

Name: _____ Title: _____ Entity: _____

Signature: _____ Date: _____

NOTARY PUBLIC ACKNOWLEDGEMENT SECTION

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me, by means of ☐ physical presence or ☐ online notarization, this ____ day of _____, 20__, by _____, as _____ for _____, who is personally known to me or who has produced _____ as identification.

Notary Public Signature: _____

(Notary Seal)

Print Name: _____

My commission expires: _____



DEPARTMENT OF FINANCE – PROCUREMENT

ANTI-HUMAN TRAFFICKING AFFIDAVIT

Rev: 1 | Date: 08/06/2024

The undersigned, on behalf of _____,
a _____ (State) _____ (Type of Entity), ("Nongovernmental
Entity"), under penalty of perjury, hereby deposes and says:

1. My name is _____.
2. I am an _____ officer or _____ authorized representative of the Nongovernmental Entity.
3. I attest that the Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes (2024), as may be amended or revised.

Under penalties of perjury, I declare that I have read the foregoing Anti-Human Trafficking Affidavit and that the facts stated in it are true.

Signature of Officer or Representative: _____

Name of Officer or Representative: _____ Title: _____

Office Address: _____

Email Address: _____

Main Phone Number: _____ FEIN No.: _____

STATE OF _____
COUNTY OF _____

Sworn to and subscribed before me by means of ☐ physical presence or ☐ online
notarization, this _____ day of _____, 2024, by _____.

(Signature of Notary Public – State of _____)

(SEAL)

Print, Type or Stamp Commissioned Name of
Notary Public)

Personally Known _____ OR Produced Identification _____

Type of Identification Produced _____



CITY OF FORT LAUDERDALE

RFP No.: 380

EXHIBIT B

RFP Title: Infor CloudSuite Managed Services

COMPETITIVE NEGOTIATIONS TERM SHEET

Date: March 20, 2025

A term sheet is a summary of the negotiations containing the agreed upon key terms of an agreement. It serves as a template, references key points, and essentially lays the foundation for ensuring the pertinent aspects of the business transaction to avoid any misunderstanding and make it clear of the intent of both parties.

| 380 - Infor CloudSuite Managed Services and Special Projects | | | | | Arisma Group, LLC dba Cendien | |
|--|--|---|------|-----|----------------------------------|--------------|
| # | Line Item | Description | Qty. | U/M | Unit Price | Extension |
| 1 | Infor Managed Services Support (IMSS)- Years 1 & 2 | Guaranteed 20 hours per week / 1040 per year | 1040 | HR | \$ 140.00 | \$145,600.00 |
| 2 | Year 3 - % Increase IMSS* | On Hourly Rate | 1 | PT | 3% | |
| 3 | Year 4 - % Increase IMSS** | On Hourly Rate | 1 | PT | 3% | |
| 4 | IMSS | Additional Hrs. per week | 1 | HR | \$ 140.00 | |
| 5 | Special Project (SP) #1 | Infor Absence Management Post-Go-Live Audit Estimated – Billed Hourly | 150 | HR | \$ 140.00 | |
| 6 | Future Special Projects | Quoted Utilizing Hourly Rate | 1 | HR | \$ 140.00 | |
| 7 | Additional | Initial Discovery Assessment | 60 | HR | Included | No Charge |
| 8 | Year 3 - % Increase SP*** | On Hourly Rate | 1 | PT | 3% | |
| 9 | Year 4 - % Increase SP***** | On Hourly Rate | 1 | PT | 3% | |

1. Line Item 1: Infor Managed Services Support (IMSS)- Years 1 & 2

- A. Years 1 and 2: Guaranteed 20 hours per week, 1040 hours per year.
- B. \$140 / hourly rate for all work with a guaranteed 20 hour per week
 - 1) To be consumed in a 4-week period.
 - 2) Overages would be at the same rate.
- C. Managed services hours can be allocated to special projects (4-week period consumption)
- D. All overages would be billed at the same rate of \$140 / hourly.
- E. Contract administration is easy to manage. Simple non-tier flat rate pricing with cost savings upfront.

2. Line Item 2: Year 3 - % Increase IMSS*

- A. If City of Fort Lauderdale (CoFL) agrees to the same 20-hour weekly consumption guarantee for Year 3, Cendien will keep the same rate without any increases.
- B. If CoFL transitions to an hourly pricing model without a minimum consumption guarantee, the hourly rate would be subject to a compounded 3% annual escalation, applied to the rate each subsequent year.

3. Line Item 3: Year 4 - % Increase IMSS**

- A. If CoFL agrees to the same 20-hour weekly consumption guarantee for Year 4, Cendien will keep the same rate without any increases.
- B. If CoFL transitions to an hourly pricing model without a minimum consumption guarantee, the hourly rate would be subject to a compounded 3% annual escalation, applied to the rate each subsequent year.



CITY OF FORT LAUDERDALE

RFP No.: 380

RFP Title: Infor CloudSuite Managed Services

COMPETITIVE NEGOTIATIONS TERM SHEET

4. **Line Item 4: Infor Managed Services Support (IMSS)** additional hours any given week
 - A. Same \$140 / hourly rate for overages beyond period consumption.
 - B. After 20 hours per week are consumed in 4 weeks (period)
 - C. Additional hours are billed at the same rate and can be managed by Fort Lauderdale.
5. **Line Item 5: Special Project #1 - Infor Absence Management Post-Go-Live Audit**
 - A. Estimated at 150 hours
 - B. Billed at an hourly rate of \$140/hour, and CoFL can also use the hours allocated for Managed Services.
6. **Line Item 6: Future Special Projects**
 - A. Quoted on Hourly Basis
 - B. Billed at an hourly rate of \$140/hour, and CoFL can also use the hours allocated for Managed Services.
7. **Line Item 7: Additional – Initial Discovery Assessment**
 - A. 60 hours of onboarding / initial discovery assessment included at No Charge.
8. **Lines Item 8: Year 3 - % Increase SP*****
 - A. If CoFL agrees to the same 20-hour weekly consumption guarantee for Year 3, Cendien will keep the same rate without any increases.
 - B. If CoFL transitions to an hourly pricing model without a minimum consumption guarantee, the hourly rate would be subject to a compounded 3% annual escalation, applied to the rate each subsequent year.
9. **Line Item 9: Year 4 - % Increase SP******
 - A. If CoFL agrees to the same 20-hour weekly consumption guarantee for Year 4, Cendien will keep the same rate without any increases.
 - B. If CoFL transitions to an hourly pricing model without a minimum consumption guarantee, the hourly rate would be subject to a compounded 3% annual escalation, applied to the rate each subsequent year.

The person below is authorized to bind the parties to the agreed upon key points and terms cited above to incorporate into an agreement.

City of Fort Lauderdale

Signature

Print Name

Position/Title

Date

Arisma Group, LLC dba Cendien

Israel Denis

Signature

Israel Denis

Print Name

Managing Director

Position/Title

03/21/2025

Date



Response For Supplier: Arisma Group, LLC dba Cendien

Event # : 380-0

Name: Infor CloudSuite Managed Services

Description: The City of Fort Lauderdale is seeking contract managed services from an Infor certified partner for Infor CloudSuite support in its ERP/INFOR Unit, Information Technology Division. The Contractor shall provide application support for Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll, Version 11.

Term: 2 Year Contract with two 1-year renewals.

Date created: November 14,
2024 10:03:09 AM EST

Preview date:

Open date: October 30, 2024
4:00:00 PM EDT

Close Date: 11/21/2024 02:00:00 PM EST

Date submitted: November 20,
2024 12:48:42 PM EST

Q & A open date: October 30,
2024 5:00:00 PM EDT

Q & A close date: November
14, 2024 5:00:30 PM EST

Dispute close date:

Responded To: 8 Out of 8 Lines

Total Bid Amount: 1,238,300.00 **Response Currency:** USD

Question Responses

| Question | Answer | Attachment |
|--|--------|-------------------------------|
| Did you download, review, sign and re-upload the required forms? | Yes | Required form Packets 1-9.pdf |

Event # 380-0: Infor CloudSuite Managed Services

| Question | Answer | Attachment |
|---|--------|--|
| Do you acknowledge that if your firm is awarded this contract, your firm will have to complete and submit the attached - Anti-Human Trafficking Affidavit Per Florida Statute 787.06 (2024), (13). | Yes | Signed Notarized Anti-Human Trafficking.pdf |
| Florida Statute 787.06 (2024), (13) When a contract is executed, renewed, or extended between a nongovernmental entity and a governmental entity, the nongovernmental entity must provide the governmental entity with an affidavit signed by an officer or a representative of the nongovernmental entity under penalty of perjury attesting that the nongovernmental entity does not use coercion for labor or services as defined in this section. For purposes of this subsection, the term "governmental entity" has the same meaning as in s. 287.138(1). | | |
| Do you acknowledge that if your firm is awarded this contract, your firm will have to complete and submit the attached Affidavit of Compliance with Foreign Entity Laws Per Florida Statute - §287.138, 692.201, 692.202, 692.203, and 692.204 | Yes | Signed Notarized Affidavit of Compliance.pdf |

Response Attachments

| Attachment |
|---|
| 20241121_Fort Lauderdale_Cendien_Proposal_Signed Copy.pdf |
| 2024_Cendien_Infor_ResumeBook_Partial.pdf |
| Required Forms_Attachments |
| E380 - Attachment A.xlsx |

Line Responses

Event # 380-0: Infor CloudSuite Managed Services

Line 1: Estimated 25 hours per week / 1300 per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Infor Managed Supports Services... Estimated 25 hours per week / 1300 per year.

Item: INFOR MANAGED SERVICES SUPPORT Estimated 25 hours per week / 1300 per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,300.0000 Unit of Measure: HR

Bid Quantity: 1,300.0000 Unit Price: 150.0000 Extended Amount: 195,000.00

No Charge: No No Bid: No

Vendor Item: INFOR MANAGED SERVICES SUPPORT Estimated 25 hours per week / 1300 per year

Line 2: YEAR 3 - % INCREASE ON HOURLY RATE

Description: Hourly Price - Annual Managed Supports Services... No pricing should be submitted here only % increase on hourly rate from Year's 1-2.

Item: YEAR 3 - % INCREASE YEAR 3 - % INCREASE ON HOURLY RATE

Commodity Code: 958-77 Project Management Services

Quantity: 1.0000 Unit of Measure: PT

Bid Quantity: 1.0000 Unit Price: 5.0000 Extended Amount: 5.00

No Charge: No No Bid: No

Vendor Item: YEAR 3 - % INCREASE YEAR 3 - % INCREASE ON HOURLY RATE

Line 4: YEAR 4 - % INCREASE ON HOURLY RATE

Description: Hourly Price - Annual Managed Supports Services... No pricing should be submitted here only % increase on hourly rate from Year 3.

Event # 380-0: Infor CloudSuite Managed Services

Item: YEAR 4 - % INCREASE YEAR 4 - % INCREASE ON HOURLY RATE

Commodity Code: 958-77 Project Management Services

Quantity: 1.0000

Unit of Measure: PT

Bid Quantity: 1.0000

Unit Price: 5.0000

Extended Amount: 5.00

No Charge: No

No Bid: No

Vendor Item: YEAR 4 - % INCREASE YEAR 4 - % INCREASE ON HOURLY RATE

Line 5: Estimated 30 hrs. per week / 1560 hours per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Estimated 30 hrs. per week / 1560 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 30 hrs. per week / 1560 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,560.0000

Unit of Measure: EA

Bid Quantity: 1,560.0000

Unit Price: 145.0000

Extended Amount: 226,200.00

No Charge: No

No Bid: No

Vendor Item: INFOR MANAGED SERVICES SUPPORT Estimated 30 hrs. per week / 1560 hours per year

Line 6: Estimated 33 hrs. per week / 1716 hours per year

Description: Estimated 33 hrs. per week / 1716 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 33 hrs. per week / 1716 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,716.0000

Unit of Measure: HR

Bid Quantity: 1,716.0000

Unit Price: 140.0000

Extended Amount: 240,240.00

No Charge: No

No Bid: No

Vendor Item: INFOR MANAGED SERVICES SUPPORT Estimated 33 hrs. per week / 1716 hours per year

Event # 380-0: Infor CloudSuite Managed Services

Line 7: Estimated 35 hrs. per week / 1820 hours per year

Description: Estimated 35 hrs. per week / 1820 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 35 hrs. per week / 1820 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,820.0000 **Unit of Measure:** HR

Bid Quantity: 1,820.0000

Unit Price: 140.0000

Extended Amount: 254,800.00

No Charge: No

No Bid: No

Vendor Item: INFOR MANAGED SERVICES SUPPORT Estimated 35 hrs. per week / 1820 hours per year

Line 8: Estimated 40 hrs. per week / 2080 hours per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Estimated 40 hrs. per week / 2080 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 40 hrs. per week / 2080 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 2,080.0000 **Unit of Measure:** HR

Bid Quantity: 2,080.0000

Unit Price: 135.0000

Extended Amount: 280,800.00

No Charge: No

No Bid: No

Vendor Item: INFOR MANAGED SERVICES SUPPORT Estimated 40 hrs. per week / 2080 hours per year

Line 9: Infor Absence Management Post-Go-Live Audit

Description: Proposers shall attach a separate quote with pricing breakdown by Title/ Role.

Item: SPECIAL PROJECT #1 Infor Absence Management Post-Go-Live Audit

Commodity Code: 918-71 IT Consulting

Event # 380-0: Infor CloudSuite Managed Services

| | |
|------------------|---------------------|
| Quantity: 1.0000 | Unit of Measure: LS |
|------------------|---------------------|

| | | |
|--|---|-----------------------------------|
| Bid Quantity: 1.0000 | Unit Price: 41,250.0000 | Extended Amount: 41,250.00 |
| No Charge: No | No Bid: No | |
| Vendor Item: SPECIAL PROJECT #1 | Infor Absence Management Post-Go-Live Audit | |



NON-COLLUSION STATEMENT

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g., ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents, and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME

RELATIONSHIPS

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

Israel Denis

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Corden, ou, email=denis@corden.com,
c=US
Location: Dallas, TX
Date: 2024.11.15 10:27:25 -05'00'

Authorized Signature

Israel Denis

Name (Printed)

Managing Director

Title

11/15/2024

Date



**CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH
NON-DISCRIMINATION PROVISIONS OF THE CONTRACT**

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-17(a)(i)(ii), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

- A. Contractors doing business with the City shall not discriminate against their employees based on the employee's race, color, religion, gender (including identity or expression), marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law.

Contracts. Every Contract exceeding \$100,000, or otherwise exempt from this section shall contain language that obligates the Contractor to comply with the applicable provisions of this section.

The Contract shall include provisions for the following:

- (i) The Contractor certifies and represents that it will comply with this section during the entire term of the contract.
- (ii) The failure of the Contractor to comply with this section shall be deemed to be a material breach of the contract, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.

Israel

Denise

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien,
ou, email=idenis@cendien.com,
c=US
Location: Dallas, TX
Date: 2024.11.15 16:27:49 -06'00'

Israel Denis

Print Name and Title

11/21/2024

Date



CONTRACT PAYMENT METHOD

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale to receive your payments fast and safely. No more waiting for checks to be printed and mailed.

In accordance with the contract, payments on this contract will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, bidders must presently have the ability to accept the credit card or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

All costs associated with the Contractor's participation in this purchasing program shall be borne by the Contractor. The City reserves the right to revise this program as necessary.

By signing below, you agree with these terms.

Please indicate which credit card payment you prefer:

____ MasterCard

____ Visa

Note: We prefer ACH payment method.

Arisma Group, LLC dba Cendien

Company Name

Israel Denis

Name (Printed)

Managing Director

Title

Israel Denis

Signature

11/15/2024

Date

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou, email=denis@cendien.com,
c=US
Location: Dallas, TX
Date: 2024.11.15 18:22:53 -0600



LOCAL BUSINESS PREFERENCE

Section 2-199.2, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-12-04), provides for a local business preference.

In order to be considered for a local business preference, a bidder must include the Local Business Preference Certification Statement of this ITB, as applicable to the local business preference class claimed **at the time of bid submittal**.

Upon formal request of the City, based on the application of a Local Business Preference the Bidder shall, within ten (10) calendar days, submit the following documentation to the Local Business Preference Class claimed:

- A) Copy of City of Fort Lauderdale current year business tax receipt, or Broward County current year business tax receipt, and
- B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the local business preference.

THE COMPLETE LOCAL BUSINESS PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:

[https://library.municode.com/fl/fort lauderdale/codes/code of ordinances?nodeId=COOR CH2 AD ARTVFI DIV2PR S2-186LOBUPR](https://library.municode.com/fl/fort%20lauderdale/codes/code%20of%20ordinances?nodeId=COOR_CH2_AD_ARTVFI_DIV2PR_S2-186LOBUPR)

Definitions: The term "Business" shall mean a person, firm, corporation or other business entity which is duly licensed and authorized to engage in a particular work in the State of Florida. Business shall be broken down into four (4) types of classes:

1. Class A Business – shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **and** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
2. Class B Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **or** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
3. Class C Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone **and** staffed with full-time employees within the limits of Broward County.
4. Class D Business – shall mean any Business that does not qualify as either a Class A, Class B, or Class C business.



LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local business price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

- (1) _____ is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the City of Fort Lauderdale current year Business Tax Receipt and a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (2) _____ is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Business Tax Receipt or a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (3) _____ is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (4) _____ requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (5) _____ requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- Business Name
- (6) Arisma Group, LLC dba Cendien is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186 and does not qualify for Local Preference consideration.
- Business Name

BIDDER'S COMPANY: Arisma Group, LLC dba Cendien

AUTHORIZED COMPANY PERSON: Israel Denis Israel Deni SIGNATURE 11/15/2024

PRINT NAME DATE

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien,
ou,email=idenis@cendien.com,
c=US
Location: Miami, FL
Date: 2024.11.15 15:46:47 -06'00'



DISADVANTAGED BUSINESS ENTERPRISE (DBE) PREFERENCE

Section 2-185, Code of Ordinances of the City of Fort Lauderdale, provides for a disadvantaged business preference.

In order to be considered for a DBE Preference, a bidder must include a certification from a government agency, as applicable to the DBE Preference class claimed **at the time of bid submittal**.

Upon formal request of the City, based on the application of a DBE Preference the Bidder shall, within ten (10) calendar days, submit the following documentation to the DBE Class claimed:

A) Copy of City of Fort Lauderdale current year business tax receipt, or Broward County current year business tax receipt, or State of Florida active registration **and/or**

B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the disadvantaged business preference.

THE COMPLETE DBE PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: <https://www.fortlauderdale.gov/home/showpublisheddocument?id=56883>

Definitions

- a. The term "disadvantaged class 1 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- b. The term "disadvantaged class 2 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with a full-time employees and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- c. The term "disadvantaged class 3 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- d. The term "disadvantaged class 4 enterprise" shall mean any disadvantaged business enterprise that does not qualify as a Class A, Class B, or Class C business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.



DISADVANTAGED BUSINESS ENTERPRISE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the disadvantaged business enterprise price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this solicitation. Violation of the foregoing provision may result in contract termination.

- (1) is a disadvantaged class 1 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (2) is a disadvantaged class 2 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with a full-time employee(s) and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (3) is a disadvantaged class 3 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (4) is a disadvantaged class 4 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that does not qualify as a Class A, Class B, or Class C business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.

Business Name

- (5) Arisma Group, LLC
dba Cendien is not considered a Disadvantaged Enterprise Business as defined in the City of Fort Lauderdale Ordinance Sec.2-185 and does not qualify for DBE Preference consideration.

Business Name

BIDDER'S COMPANY: Arisma Group, LLC dba Cendien

AUTHORIZED COMPANY PERSON: Israel Denis
PRINT NAME

Israel Denis
SIGNATURE

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou, email=idenis@cendien.com, c=US
Location: Dallas, TX
11/21/2024
2024.11.15 16:47:18 -05'00' DATE



E-VERIFY AFFIRMATION STATEMENT

Solicitation/Bid /Contract No: 380

Project Description:

Infor CloudSuite application support and managed services for the City, in accordance with the terms, conditions, and specifications contained in RFP Event #380

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- A. all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- B. all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name: Arisma Group, LLC dba Cendien

Authorized Company Person's Signature: Israel Denis
Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou,
email=idenis@cendien.com, c=US
Location: Dallas, TX
Date: 2024.11.15 16:48:07 -06'00'

Authorized Company Person's Title: Managing Director

Date: 11/15/2024



REFERENCES

A minimum of three (3) references shall be provided. It is the responsibility of the Bidder/ Proposer to ensure that the information provided is accurate and current. The City may find your firm non-responsive for providing wrong and or outdated information. Additional references may be provided on a separate page.

| | |
|-----------------|--|
| Company Name: | Regional Transit Authority |
| Address: | 175 W. Jackson Blvd, Suite 1550 Chicago, IL 60604 |
| Contact Person: | Asha Mathunny |
| Title: | IT Director, Applications Services |
| Phone #: | (312) 913-3200 |
| Email: | asha.mathunny@rtachicago.org |
| Contract Value: | \$1.8M |
| Year(s): | 5+ (Status: Ongoing) |
| Description: | We provided RTA with comprehensive management and support of their Infor Applications. This project involved implementing an ERP Roadmap to enhance application functionalities, resolving complex system issues and improving reporting mechanisms. |

| | |
|-----------------|--|
| Company Name: | Santa Clara Valley Water District |
| Address: | 5750 Almaden Expy, San Jose, CA 95118 |
| Contact Person: | Linda Huang |
| Title: | Corporate Applications Manager - Software Services |
| Phone #: | (408) 630-2459 |
| Email: | LHuang@valleywater.org |
| Contract Value: | \$400,000 |
| Year(s): | 5+ (Status: Ongoing) |
| Description: | We developed various reports using Birst, IPA, and ISD, and provided ongoing support for the deployment of Infor CloudSuite applications. Also, we created a much-needed enhancement to their timesheet form, which reduced time entry and improved user experience across the organization—work that even Infor could not tackle. |

| | |
|-----------------|---|
| Company Name: | City of Concord |
| Address: | 1950 Parkside Dr, Concord, CA 94519 |
| Contact Person: | Damaris Sambajon |
| Title: | IT Manager, Enterprise Applications |
| Phone #: | (510) 207-9737 |
| Email: | damaris.sambajon@cityofconcord.org |
| Contract Value: | \$450,000 |
| Year(s): | 5+ (Status: Ongoing) |
| Description: | We provided both functional & technical expertise for issues resolution, business process improvement, system setup, configuration changes, user requirements, report design, enhancement requests, and system changes. We were able to quickly integrate to COC and become an extension of their support team. |

SECTION VI - COST PROPOSAL PAGE

Proposer's Name: Arisma Group, LLC dba Cendien

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Contractor shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Hourly Price - Annual Managed Supports Services...

- | | |
|---|-------------------|
| 1) Estimated 25 hrs. per week / 1300 hrs. per year. | \$ <u>150</u> /HR |
| 2) Year 3 - % Increase on Hourly Rate | <u>5</u> % |
| 3) Year 4 - % Increase on Hourly Rate | <u>5</u> % |

Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

- | | |
|---|----------------------------------|
| 4) Estimated 30 hrs. per week / 1560 hours per year | \$ <u>145</u> /HR |
| 5) Estimated 33 hrs. per week / 1716 hours per year | \$ <u>140</u> /HR |
| 6) Estimated 35 hrs. per week / 1820 hours per year | \$ <u>140</u> /HR |
| 7) Estimated 40 hrs. per week / 2080 hours per year | \$ <u>135</u> /HR |
| 8) Special Project #1: | |
| Infor Absence Management Post-Go-Live Audit | \$ <u>41,250</u> Lump Sum |
| Proposers shall attach a separate quote with pricing breakdown by Title/ Role. | |
| 9) The City of Fort Lauderdale may, at its discretion, choose to amend the contract with the Contractor for additional services for Special Projects. Please include an additional list of all Titles/Roles and their hourly rates on the attached Excel, Attachment A . | |

Submitted by:

Israel Denis

Name (printed)

11/15/2024

Date

Israel Denis

Signature

Managing Director

Title

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou,
email=idenis@cendien.com, c=US
Location: Dallas, TX
Date: 2024.11.15 16:25:29 -06'00'

| REQUEST FOR PROPOSALS - EVENT 380 INFOR CLOUDSUITE MANAGED SERVICES | | | | | | | | | | |
|--|------------|-------------|--|-------|-----|---|--------|----------------------|--------------|--------------|
| NAME OF FIRM: Arisma Group LLC, dba Cendien | | | | | | CITY OF FORT LAUDERDALE ADDITIONAL PRICING PROPOSAL PAGE | | | | |
| No. | First Name | Last Name | Title/Role/Classification | Prime | Sub | Years Experience In this Role | UOM | Rates Years 1 & 2 | Rates Year 3 | Rates Year 4 |
| 1 | Nicole | Sutti | Senior Infor Techno Functional Consultant | X | | 25 | Hourly | \$ 160.00 | \$ 165.00 | \$ 170.00 |
| 2 | Randika | Wijesena | Senior Infor Functional Consultant (GHR / Talent) | X | | 20 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 3 | Muriel | Penafuerte | Senior Infor Technical Consultant (LPL Developer / ION) | X | | 22 | Hourly | \$ 160.00 | \$ 165.00 | \$ 170.00 |
| 4 | Adarsh | Pal | Senior Infor Technical Consultant (LPL Developer / ION) | X | | 11 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 5 | Vishal | Modi | Dot Net Developer | X | | 10 | Hourly | \$ 90.00 | \$ 95.00 | \$ 100.00 |
| 6 | Siva | Kumar | Senior Infor Functional Consultant (FSM / SCM / Project Manager) | X | | 15 | Hourly | \$ 140.00 | \$ 145.00 | \$ 150.00 |
| 7 | Kiran | Chiluka | Senior Infor Functional Consultant (FSM) | X | | 15 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 8 | Lowell | Luis | Senior Infor Functional Consultant (FSM) | X | | 30 | Hourly | \$ 165.00 | \$ 170.00 | \$ 175.00 |
| 9 | Ardelle | O'Brien | Senior Infor Functional Consultant (SCM) | X | | 25 | Hourly | \$ 165.00 | \$ 170.00 | \$ 175.00 |
| 10 | Joanne | DeLorenzo | Senior Infor Functional Consultant (HR / Payroll / GHR / Talent) | X | | 24 | Hourly | \$ 165.00 | \$ 170.00 | \$ 175.00 |
| 11 | Sharon | Jordan | Senior Infor Functional Consultant (HR / Payroll / GHR / Talent) | X | | 35 | Hourly | \$ 165.00 | \$ 170.00 | \$ 175.00 |
| 12 | Raj | Kumar | Senior Infor Functional Consultant (GHR / Talent) | X | | 18 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 13 | Subba | Mopuru | Senior Infor Techno Functional Consultant (Sys Admin / Interfaces) | X | | 22 | Hourly | \$ 155.00 | \$ 160.00 | \$ 165.00 |
| 14 | Sethu | Pathy | Senior Infor BI Technical Consultant (Birst / Infor BI / LBI / Reporting) | X | | 18 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 15 | Keerthy | Jayavelu | Senior Infor BI Technical Consultant (Birst / Infor BI / LBI / Reporting) | X | | 19 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 16 | Lakshmi | Damerla | Senior Infor Techo / Functional Consultant (Interfaces / IPA / HR / FSM) | X | | 27 | Hourly | \$ 165.00 | \$ 170.00 | \$ 175.00 |
| 17 | Yohan | Dole | Senior Infor BI Technical Consultant (Birst / Infor BI / LBI / Reporting) | X | | 20 | Hourly | \$ 160.00 | \$ 165.00 | \$ 170.00 |
| 18 | Preetha | Kumar | Senior Infor BI Technical Consultant (Birst / Infor BI / LBI / Reporting) | X | | 12 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 19 | Suresh | Mohan | Senior Infor Technical Consultant | X | | 17 | Hourly | \$ 155.00 | \$ 160.00 | \$ 165.00 |
| 20 | Javier | Silva | Senior Infor Technical Consultant (Project Manager / Client Support) | X | | 15 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 21 | Imran | Khan | Senior Infor Technical Consultant (Sys Admin) | X | | 16 | Hourly | \$ 155.00 | \$ 160.00 | \$ 165.00 |
| 22 | Sunil | Punnachalil | Senior Infor Technical Consultant (Sys Admin) | X | | 22 | Hourly | \$ 160.00 | \$ 165.00 | \$ 170.00 |
| 23 | Alistair | Hull | Senior Infor Technical Consultant (Sys Admin) | X | | 26 | Hourly | \$ 175.00 | \$ 180.00 | \$ 185.00 |
| 24 | Austin | Hynes | Senior Consultant (System Support / Helpdesk) | X | | 9 | Hourly | \$ 100.00 | \$ 105.00 | \$ 110.00 |
| 25 | Shirley | Duong | Senior Infor Consultant (Client Success / Project Management / System Support) | X | | 10 | Hourly | \$ 130.00 | \$ 135.00 | \$ 140.00 |
| 26 | Moyl | Banerjee | Senior Infor Consultant (Client Success / Project Management / System Support) | X | | 12 | Hourly | \$ 130.00 | \$ 135.00 | \$ 140.00 |
| 27 | Lenny | Zemman | Senior Infor Consultant (Project Management / Business Intelligence / System Admin) | X | | 24 | Hourly | \$ 160.00 | \$ 165.00 | \$ 170.00 |
| 28 | Aishwarya | Pappu | Senior Consultant (System Support / Helpdesk / Sales Support) | X | | 5 | Hourly | \$ 90.00 | \$ 95.00 | \$ 100.00 |
| 29 | David | Altwardt | Senior Infor Technical Consultant (Database Admin) | X | | 35 | Hourly | \$ 175.00 | \$ 180.00 | \$ 185.00 |
| 30 | Liz | Smith | Senior Infor Functional Consultant (HR / Payroll / GHR / Talent) | X | | 30 | Hourly | \$ 165.00 | \$ 170.00 | \$ 175.00 |
| 31 | Adrian | Rodriguez | Senior Infor Functional Consultant (HR / Payroll / GHR / Talent) | X | | 18 | Hourly | \$ 150.00 | \$ 155.00 | \$ 160.00 |
| 32 | Israel | Denis | Senior Infor Consultant (Practice Director) | X | | 27 | Hourly | \$ 200.00 | \$ 205.00 | \$ 210.00 |

*Add additional lines as needed.

When you sign up for our managed services, we handle your projects using the managed services rate. This means we apply the best rate available based on your chosen plan, ensuring you receive the most cost-effective solution.

CITY OF FORT LAUDERDALE BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder/proposer to ensure that their response is submitted electronically through the City's on-line strategic sourcing platform prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) Arisma Group, LLC dba Cendien EIN (Optional): 20-2859158

Address: 1846 E Rosemeade Parkway Suite 200

City: Carrollton State: TX Zip: 75007

Telephone No.: (214) 245-4580 FAX No.: N/A Email: vendor@cendien.com

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): 7 Calendar/ 5 business days

Total Bid Discount (section 1.05 of General Conditions): _____

Check box if your firm qualifies for DBE (section 1.09 of General Conditions): ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

| Addendum No. | Date Issued | Addendum No. | Date Issued | Addendum No. | Date Issued | Addendum No. | Date Issued |
|--------------|-------------|--------------|-------------|--------------|-------------|--------------|-------------|
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A.

N/A

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Israel Denis

Name (printed)

11/21/2024

Date

Israel Denis

Signature

Managing Director

Title

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou,
email=idenis@cendien.com, c=US
Location: Dallas, TX
Date: 2024.11.15 16:22:20 -06'00'



DEPARTMENT OF FINANCE – PROCUREMENT

ANTI-HUMAN TRAFFICKING AFFIDAVIT

Rev: 1 | Date: 08/06/2024

The undersigned, on behalf of Arisma Group, LLC dba Cendien,
a TX (State) LLC (Type of Entity), ("Nongovernmental
Entity"), under penalty of perjury, hereby deposes and says:

1. My name is Israel Denis.
2. I am an ☒ officer or ☐ authorized representative of the Nongovernmental Entity.
3. I attest that the Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes (2024), as may be amended or revised.

Under penalties of perjury, I declare that I have read the foregoing Anti-Human Trafficking Affidavit and that the facts stated in it are true.

Signature of Officer or Representative: Israel Denis

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou,
email=idenis@cendien.com, c=US
Location: Dallas, TX
Date: 2024.11.15 16:26:30 -0600

Name of Officer or Representative: Israel Denis Title: Managing Director

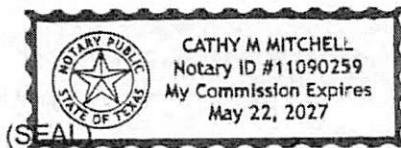
Office Address: 1846 E Rosemeade Parkway Suite 200, Carrollton, TX 75007-2637

Email Address: vendor@cendien.com

Main Phone Number: (214) 245-4580 FEIN No.: 20-2859158

STATE OF Texas
COUNTY OF Denton

Sworn to and subscribed before me by means of ☒ physical presence or ☐ online
notarization, this 15th day of November, 2024, by Israel Denis.



Cathy M. Mitchell
(Signature of Notary Public – State of Texas)

CATHY M. MITCHELL
Print, Type or Stamp Commissioned Name of
Notary Public)

Personally Known ☒ OR Produced Identification ☒

Type of Identification Produced DL-23146950

AFFIDAVIT OF COMPLIANCE WITH FOREIGN ENTITY LAWS
(Florida Statute- §287.138, 692.201, 692.202, 692.203, and 692.204)

The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury as follows:

1. Entity is not owned by the government of a foreign country of concern as defined in Section 287.138, Florida Statutes. (Source: § 287.138(2)(a), Florida Statutes)
2. The government of a foreign country of concern does not have a controlling interest in Entity. (Source: § 287.138(2)(b), Florida Statutes)
3. Entity is not organized under the laws of, and does not have a principal place of business in, a foreign country of concern. (Source: § 287.138(2)(c), Florida Statutes)
4. Entity is not owned or controlled by the government of a foreign country of concern, as defined in Section 692.201, Florida Statutes. (Source: § 288.007(2), Florida Statutes)
5. Entity is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Section 692.201, Florida Statutes, or a subsidiary of such entity. (Source: § 288.007(2), Florida Statutes)
6. Entity is not a foreign principal, as defined in Section 692.201, Florida Statutes. (Source: § 692.202(5)(a)(I), Florida Statutes)
7. Entity is in compliance with all applicable requirements of Sections 692.202, 692.203, and 692.204, Florida Statutes.
8. **(Only applicable if purchasing real property)** Entity is not a foreign principal prohibited from purchasing the subject real property. Entity is either (a) not a person or entity described in Section 692.204(1)(a), Florida Statutes, or (b) authorized under Section 692.204(2), Florida Statutes, to purchase the subject property. Entity is in compliance with the requirements of Section 692.204, Florida Statutes. (Source: §§ 692.203(6)(a), 692.204(6)(a), Florida Statutes)
9. The undersigned is authorized to execute this affidavit on behalf of Entity.

Name: Israel Denis Title: Managing Director Entity: Arisma Group, LLC dba Cendien

Signature: Israel Denis Date: 11/15/2024

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien,
ou, email=Israel.Denis@Cendien.com,
c=US
Location: Dallas, TX
Date: 2024.11.15 16:27:01 -0500

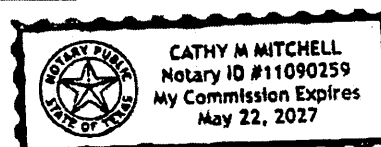
NOTARY PUBLIC ACKNOWLEDGEMENT SECTION

STATE OF Texas
COUNTY OF Denton

The foregoing instrument was acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 15th day of November 2024, by Israel Denis, as Managing Director for Arisma Group, LLC dba Cendien, who is personally known to me or who has produced DL-23146950 as identification.

Notary Public Signature: Cathy M. Mitchell

Print Name: CATHY M. MITCHELL



My commission expires: 5/22/2027

Example of our Certificate of Insurance

35348 Arisma Group, LLC Acential LLC

Certificate of Insurance

11/1/2023 7:01:18 PM



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/1/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

| | | | |
|------------|---|---|-----------------------------|
| PRODUCER | TechInsurance, Division of Specialty Program Group LLC 203 N. LaSalle St., 20th Floor, Chicago, IL 60601 | CONTACT NAME: | |
| | | PHONE (A/C No. Ext.): (800) 888-1984 | FAX (A/C No.): 312-690-4123 |
| INSURED | Arisma Group, LLC Acential LLC PO Box 117077, Carrollton, TX. 75011 | E-MAIL ADDRESS: | |
| | | INSURER(S) AFFORDING COVERAGE | |
| | | INSURER A: Hartford Multi-State | NAIC # 00014 |
| | | INSURER B: Philadelphia Indemnity Insurance Company | 18058 |
| | | INSURER C: Philadelphia Indemnity Insurance Company | 18058 |
| | | INSURER D: Hartford Lloyd's Insurance Company | 38253 |
| INSURER E: | | | |
| INSURER F: | | | |

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF DISBURANCE | ADDL SUBR NSD WND | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS |
|----------|---|-------------------|---------------|-------------------------|-------------------------|---|
| D | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER | Yes Yes | 46SBAAE2264 | 8/13/2023 | 8/13/2024 | EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (EA OCCURRENCE) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 \$ |
| D | AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS | Yes Yes | 46SBAAE8884 | 8/13/2023 | 8/13/2024 | COMBINED SINGLE LIMIT (EA ACCIDENT) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ |
| | UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$ | | | | | EACH OCCURRENCE \$ AGGREGATE \$ \$ |
| A | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below | Y/N No | 45WBCAH8707 | 4/18/2023 | 4/18/2024 | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000 |
| B | Professional Liability (Errors and Omissions) | | PHSD1502512 | 6/23/2023 | 6/23/2024 | Occurrence/Aggregate \$3,000,000 / \$3,000,000 |
| C | Cyber Liability | | PHSD1502514 | 6/23/2023 | 6/23/2024 | Each Occurrence \$2,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Attention/Note: Risk Management Ref: Contract No. 1000000000

Certificate Holder is named as Additional Insured as their interests may appear in regards to general liability when required by written contract. Waiver of subrogation in favor of the certificate holder with regard to the general liability coverage.

This insurance is primary and non-contributory to any other insurance provided as respects general liability coverage.

CERTIFICATE HOLDER

CANCELLATION

This will be the address of the Client

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

[Signature]

CAM #25-0377

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

Give form to the
requester. Do not
send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

ARISMA GROUP, LLC

2 Business name/disregarded entity name, if different from above.

CENDIEN

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☒ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) C

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐

5 Address (number, street, and apt. or suite no.). See instructions.

1846 E. ROSEMEADE PKWY, SUITE 200

Requester's name and address (optional)

6 City, state, and ZIP code

CARROLLTON, TX 75007

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

 - -

or

Employer identification number

2 0 - 2 8 5 9 1 5 8

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person

Israel Denis

DN: cn=Israel Denis, o=Cendien, ou,
email=idenis@cendien.com, c=US
Location: Dallas, TX
Date: 2024.10.23 12:32:54 -05'00'

Date 10/23/2024

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441-1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or "doing business as" (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner's name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

| IF the entity/individual on line 1 is a(n) . . . | THEN check the box for . . . |
|--|--|
| • Corporation | Corporation. |
| • Individual or • Sole proprietorship | Individual/sole proprietor. |
| • LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation | Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation. |
| • Partnership | Partnership. |
| • Trust/estate | Trust/estate. |

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

2—The United States or any of its agencies or instrumentalities.

3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.

5—A corporation.

6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.

7—A futures commission merchant registered with the Commodity Futures Trading Commission.

8—A real estate investment trust.

9—An entity registered at all times during the tax year under the Investment Company Act of 1940.

10—A common trust fund operated by a bank under section 584(a).

11—A financial institution as defined under section 581.

12—A middleman known in the investment community as a nominee or custodian.

13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

| IF the payment is for . . . | THEN the payment is exempt for . . . |
|--|---|
| • Interest and dividend payments | All exempt payees except for 7. |
| • Broker transactions | Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012. |
| • Barter exchange transactions and patronage dividends | Exempt payees 1 through 4. |
| • Payments over \$600 required to be reported and direct sales over \$5,000 ¹ | Generally, exempt payees 1 through 5. ² |
| • Payments made in settlement of payment card or third-party network transactions | Exempt payees 1 through 4. |

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

| For this type of account: | Give name and SSN of: |
|--|---|
| 1. Individual | The individual |
| 2. Two or more individuals (joint account) other than an account maintained by an FFI | The actual owner of the account or, if combined funds, the first individual on the account ¹ |
| 3. Two or more U.S. persons (joint account maintained by an FFI) | Each holder of the account |
| 4. Custodial account of a minor (Uniform Gift to Minors Act) | The minor ² |
| 5. a. The usual revocable savings trust (grantor is also trustee) | The grantor-trustee ¹ |
| b. So-called trust account that is not a legal or valid trust under state law | The actual owner ¹ |
| 6. Sole proprietorship or disregarded entity owned by an individual | The owner ³ |
| 7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))** | The grantor ⁴ |

| For this type of account: | Give name and EIN of: |
|---|---------------------------|
| 8. Disregarded entity not owned by an individual | The owner |
| 9. A valid trust, estate, or pension trust | Legal entity ⁴ |
| 10. Corporation or LLC electing corporate status on Form 8832 or Form 2553 | The corporation |
| 11. Association, club, religious, charitable, educational, or other tax-exempt organization | The organization |
| 12. Partnership or multi-member LLC | The partnership |
| 13. A broker or registered nominee | The broker or nominee |
| 14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments | The public entity |
| 15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))** | The trust |

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Document Number](#) /

Detail by Document Number

Foreign Limited Liability Company

ARISMA GROUP, LLC

Filing Information

Document Number M23000011353

FEI/EIN Number 20-2859158

Date Filed 09/01/2023

State TX

Status ACTIVE

Principal Address

1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Mailing Address

1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Registered Agent Name & Address

VALDES DENIS, RAMON
656 SOUTH DRIVE
MIAMI SPRINGS, FL 33166

Authorized Person(s) Detail

Name & Address

Title MGR

DENIS, ISRAEL
1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Title MBR

DENIS, LIDIA
1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Title MBR

ISRAEL DENIS, DOMINGO
1846 E ROSEMEADE PARKWAY SUITE 200
CARROLLTON, TX 75007

Annual Reports

| Report Year | Filed Date |
|-------------|------------|
| 2024 | 04/29/2024 |

Document Images

| | |
|---|--|
| 04/29/2024 -- ANNUAL REPORT | View image in PDF format |
| 09/01/2023 -- Foreign Limited | View image in PDF format |

Florida Department of State, Division of Corporations

OPERATING AGREEMENT

for
ARISMA GROUP, LLC

A MULTIPLE MEMBER-MANAGED LIMITED LIABILITY COMPANY

ARTICLE I Company Formation

- 1.1. **FORMATION.** The members have formed a Limited Liability Company (the "Company") according to the laws of the state in which the Company was formed. This operating agreement is entered into and effective as of the date it is adopted by the members.
- 1.2. **REGISTERED AGENT.** The name and location of the Company's registered agent will be stated in the company's formation documents.
- 1.3. **TERM.** The Company will continue perpetually unless:
 - (a) Members whose capital interest as defined in Article 2.2 exceeds 50 percent vote for dissolution;
 - (b) Any event which causes the Company's business to become unlawful;
 - (c) The death, resignation, expulsion, bankruptcy, retirement of a member or the occurrence of any other event that terminates the continued membership of a member of the Company; or
 - (d) Any other event causing dissolution of the Company under applicable state laws.
- 1.4. **CONTINUANCE OF COMPANY.** In the event of an occurrence described in Section 1.3(c), if there are at least two remaining members, those members have the right to continue the business of the Company. This right can be exercised only by the unanimous vote of the remaining members within ninety (90) days after the occurrence of an event described in Section 1.3(c). If not exercised, the right of the members to continue the business of the Company will expire.
- 1.5. **BUSINESS PURPOSE.** The Company will conduct any lawful business deemed appropriate in carrying out the company's objectives.
- 1.6. **PRINCIPAL PLACE OF BUSINESS.** The Company's principal place of business will be stated in the formation documents, or as selected by the members.
- 1.7. **THE MEMBERS.** The name and residential address of each member are listed in Certification of Member section of this agreement.
- 1.8. **ADMISSION OF ADDITIONAL MEMBERS.** Additional members may only be admitted to the Company through a Certificate of New Membership issuance by the company of new interest in the Company or as otherwise provided in this agreement.

ARTICLE II
Capital Contributions

- 2.1. **INITIAL CONTRIBUTIONS.** The members will initially contribute capital to the Company, as described in Exhibit 1 attached to this agreement. The agreed total value of such property and cash is \$191,228.26.
- 2.2. **ADDITIONAL CONTRIBUTIONS.** Except as provided in ARTICLE 6.2, no member will be obligated to make any additional contribution to the Company's capital.

ARTICLE III
Profits, Losses and Distributions

- 3.1. **PROFITS/LOSSES.** For financial accounting and tax purposes, the Company's net profits, or net losses will be determined on an annual basis. These profits and losses will be allocated to the members in proportion to each member's capital interest in the Company as set forth in this agreement below, as amended, and in accordance with Treasury Regulation 1.704-1.
- 3.2. **DISTRIBUTIONS.** The members will determine and distribute available funds annually or as they see fit. "Available funds" refers to the net cash of the Company available after expenses and liabilities are paid. Upon liquidation of the Company or liquidation of a member's interest, distributions will be made in accordance with the positive capital account balances or pursuant to Treasury Regulation 1.704-1(b)(2)(ii)(b) (2). To the extent a member has a negative capital account balance, there will be a qualified income offset, as set forth in Treasury Regulation 1.704-1(b)(2)(ii)(d).

ARTICLE IV
Management

- 4.1. **MANAGEMENT OF THE BUSINESS.** The members are responsible for the management of the Company.
- 4.2. **MEMBERS.** The liability of the members will be limited according to state law. No member is an agent of any other member of the Company, solely by reason of being a member.
- 4.3. **POWERS OF MEMBERS.** All members are authorized on the Company's behalf to make decisions as to:
- (a) the sale, development, lease, or other disposition of the Company's assets;
 - (b) the purchase or other acquisition of other assets;
 - (c) the management of all or any part of the Company's assets;
 - (d) the borrowing of money and the granting of security interests in the Company's assets;
 - (e) the pre-payment, refinancing, or extension of any loan affecting the Company's assets;
 - (f) the compromise or release of any of the Company's claims or debts; and

- (g) the employment of persons, firms, or corporations for the operation and management of the Company's business.

The members are further authorized to execute and deliver:

- (w) all contracts, conveyances, assignments leases, sub-leases, franchise agreements, licensing agreements, management contracts and maintenance contracts covering or affecting Company assets;
- (x) all checks, drafts, and other orders for the payment of the Company's funds;
- (y) all promissory notes, loans, security agreements, and other similar documents; and
- (z) all other instruments of any other kind relating to the Company's affairs.

- 4.4. **CHIEF EXECUTIVE MEMBER.** The members may elect a Chief Executive Member, as set forth in Exhibit 2, as may be amended. The Chief Executive Member has primary responsibility for managing the operations of the Company and for carrying out the decisions of the members. If a Chief Executive Member is elected, then the powers listed in Section 4.3 shall be held by the Chief Executive Member. If a Chief Executive Member is elected, then the other members will take no part in the control, management, direction, or operation of the Company's affairs and will have no power to bind the Company in legal agreements. The Chief Executive Member may seek advice from the members but need not follow such advice.
- 4.5. **NOMINEE.** Title to the Company's assets must be held in the Company's name or in the name of any nominee that the members may designate. Pursuant to the powers listed in Section 4.3, the members have power to enter into a nominee agreement with any such person, and such agreement may contain provisions indemnifying the nominee, except for his or her willful misconduct.
- 4.6. **COMPANY INFORMATION.** The Chief Executive Member must supply information regarding the company or its activities to any member upon request. Any member, or their authorized representative, will have access to and may inspect and copy all books, records, and materials in the Chief Executive Member's possession regarding the Company or its activities. Access and inspection of information will be at the requesting member's expense.
- 4.7. **EXCULPATION.** Any act or omission of the Chief Executive Member, the effect of which may cause loss or damage to the Company or the members, if done in good faith to promote the best interests of the Company, will not subject the Chief Executive Member to any liability.
- 4.8. **INDEMNIFICATION.** The Company will indemnify any person who was or is a party defendant or is threatened to be made a party defendant, in a pending or completed action, suit or proceeding, whether civil, criminal, administrative, or investigative (other than an action by or in the right of the Company) by reason of the fact that the person is or was a member of the Company, employee, or agent of the Company, or is or was serving at the request of the Company, for instant expenses (including attorney's fees), judgments, fines, and amounts paid in settlement actually and reasonably incurred in connection with such action, suit or proceeding if the members determine that the person acted in good faith and in a manner he or she reasonably believed to be in or not opposed to the best interest of the Company, and with

respect to any criminal action proceeding, has no reasonable cause to believe his or her conduct was unlawful. The termination of any action, suit, or proceeding by judgment, order, settlement, conviction, or upon a plea of "no lo Contendere" or its equivalent, does not in itself create a presumption that the person did or did not act in good faith and in a manner which he or she reasonably believed to be in the best interest of the Company, and, with respect to any criminal action or proceeding, had reasonable cause to believe that his or her conduct was lawful.

4.9. **RECORDS.** The members must keep the following at the company's principal place of business or other location:

- (a) A current list of the full name and the last known street address of each member;
- (b) A copy of the Articles of Organization, this operating agreement, and all amendments to either document;
- (c) Copies of Company's federal, state and local income tax returns and reports for the three (3) most recent years;
- (d) Copies of the Company's financial statements for the three (3) most recent years.

ARTICLE V Compensation

- 5.1. **MANAGEMENT FEE.** Any member rendering services to the Company is entitled to compensation proportionate with the value of those services.
- 5.2. **REIMBURSEMENT.** The Company must reimburse the members for all direct out-of-pocket expenses incurred by them in managing the Company.

ARTICLE VI Bookkeeping

- 6.1. **BOOKS.** The Chief Executive Member will maintain a complete and accurate accounting of the Company's affairs at the Company's principal place of business. The members may select the method of accounting and the company's accounting period will be the calendar year.
- 6.2. **MEMBER'S ACCOUNTS.** The members must maintain separate capital and distribution accounts for each member. Each member's capital account will be determined and maintained in the manner set forth in Treasury Regulation 1.704-1(b)(2)(iv) and will consist of his or her initial capital contribution increased by:
- (a) Any additional capital contribution made by the member;
 - (b) Credit balances transferred from the member's distribution account to his or her capital account;
- and decreased by:
- (x) Distributions to the member in reduction of Company capital;
 - (y) The member's share of Company losses if charged to his or her capital account.

- 6.3. **REPORTS.** The Chief Executive Member will close the books of account after the close of each calendar year and will prepare and send to each member, a statement of such member's distributive share of income and expense for income tax reporting purposes.

ARTICLE VII

'Transfers

- 7.1. **ASSIGNMENT.** If a member proposes to sell, assign, or otherwise dispose of all or any part of his or her interest in the Company, that member must first make a written offer to sell his or her interest to the other members at a price determined by mutual agreement. If the other members decline or fail to elect such interest within thirty (30) days, and if the sale or assignment is made and the members fail to approve this sale or assignment unanimously then, pursuant to the applicable law, the purchaser or assignee will have no right to participate in the management of the business and affairs of the Company. The purchaser or assignee will only be entitled to receive the share of the profits or other compensation by way of income and the return of contributions to which that member would otherwise be entitled.

ARTICLE VIII

Dissolution

- 8.1. **DISSOLUTION.** The member(s) may dissolve the company at any time. The member may NOT dissolve the company for a loss of membership interests. Upon dissolution the company must pay its debts first before distributing cash, assets, and/or initial capital to the member or the members interests. The dissolution may only be ordered by the member(s), not by the owner of the members interests.

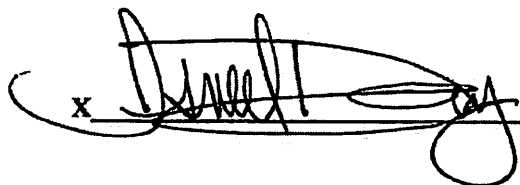
CERTIFICATION OF MEMBER

The undersigned hereby agree, acknowledge, and certify that the foregoing operating agreement is adopted and approved by each member as of this 31st day of July 2005.

Members:

Name ISRAEL DENIS Percent 62 %

Address 2514 Sir Tristram Lane. Lewisville, TX 75056

X 

Name Lidia Denis Percent 19 %

Address 2514 Sir Tristram Lane. Lewisville, TX 75056

X 

Name Domingo Israel Denis Percent 19 %

Address 2514 Sir Tristram Lane. Lewisville, TX 75056

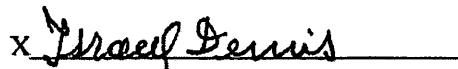
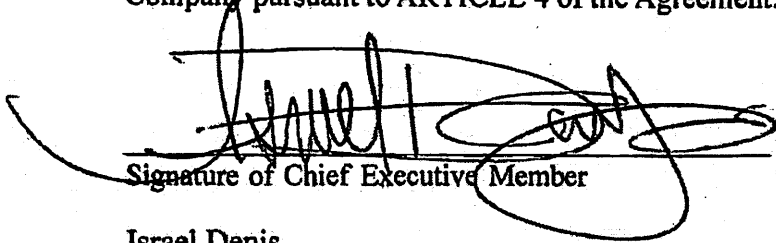
X 

EXHIBIT 2
LISTING OF CHIEF EXECUTIVE MEMBER

By a majority vote of the members the following Chief Executive Member was elected to operate the Company pursuant to ARTICLE 4 of the Agreement:



Signature of Chief Executive Member

Israel Denis
Printed Name

Address: 2514 Sir Tristram Lane
Lewisville, TX 75056

Title: Managing Director

The above-listed Chief Executive Member will serve in their capacities until they are removed for any reason by a majority vote of the members as defined by ARTICLE 4 or upon their voluntary resignation.

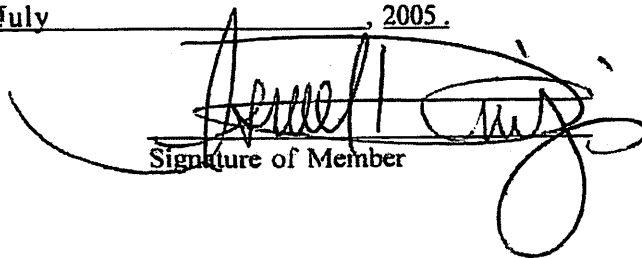
Signed and Agreed this 31st day of July, 2005.



Signature of Member



Signature of Member



Signature of Member

infor

We work
TOGETHER
with you.

CENDIEN
empowering business

Professional Services



CITY OF FORT LAUDERDALE



Response to

Proposal for RFP Event #380
Infor CloudSuite Managed Services

City of Fort Lauderdale
Attn: Laurie Platkin
Senior Procurement Specialist
(954) 828-5138
lplatkin@fortlauderdale.gov

Israel Denis
Cendien
1846 E Rosemeade Pkwy #200
Carrollton, TX 75007
Cell: (214) 202-5896
Office: (214) 245-4580
idenis@cendien.com

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Cover Letter

City of Fort Lauderdale

November 21, 2024

Attn: Laurie Platkin
Senior Procurement Specialist
(954) 828-5138
lplatkin@fortlauderdale.gov

Cendien is pleased to present this proposal to the City of Fort Lauderdale for providing Infor CloudSuite application support and managed services. We are grateful for the opportunity to participate in RFP Event #380 and are committed to delivering exceptional service to enhance the City's operational efficiency. Our proposal details how we can offer the necessary Infor CloudSuite software managed services to meet your specific needs, and the requirements outlined in the RFP. Our primary goal is to assist the City in effectively managing its Infor Applications and Systems by providing outstanding services, ensuring rapid response times, and expediting the completion of deliverables. We are confident that our expertise and commitment will significantly benefit the City of Fort Lauderdale, and we look forward to the opportunity to collaborate and contribute to your success.

At Cendien, we take pride in delivering exceptional customer service, rapid response times, and unparalleled professional expertise. Our team of Infor Consultants, each with over 15 years of experience, are true specialists in both Infor Lawson and Infor CloudSuite. As a certified Infor partner and a full-service provider of Infor consulting and managed services, we excel in supporting clients with all their Infor requirements. Our expertise spans across financials, procurement, human resources, payroll, budgeting, technical administration, and analytics.

Our team of consultants and application experts consistently deliver results that exceed expectations. And we are confident in our ability to be the trusted partner you seek, providing the highest level of support and ensuring your systems operate seamlessly. Given the opportunity, we are eager to demonstrate how our skills and dedication can significantly benefit your organization. Thank you for considering Cendien as your partner in achieving operational excellence.

Cendien, a certified Minority Business Enterprise (MBE) by NCTRCA, is based in Dallas, Texas, and has a nationwide team of over forty consultants. We do not plan to involve subcontractors for this project. As the President and Managing Director, I am the representative for all matters related to this proposal and have full authority to uphold all commitments made within it.

On behalf of Cendien, thank you for considering our response for Infor CloudSuite Managed Services. We welcome further discussions and are happy to answer any questions. We look forward to the possibility of working together and contributing to the success of the City.

Sincerely,

Israel Denis

Digitally signed by Israel Denis
DN: cn=Israel Denis, o=Cendien, ou,
email=idenis@cendien.com, c=US
Location: Dallas, TX
Date: 2024.11.18 16:26:58 -06'00'

Israel Denis
President and Managing Director



Section 1 – Executive Summary

Each Offeror must submit an executive summary that identifies the business entity, its background, main office(s), and office location that will service this contract. Identify the officers, principals, supervisory staff, and key individuals who will be directly involved with the work and their office locations. The executive summary should also summarize the key elements of the proposal.

Arisma Group LLC, dba Cendien ("Cendien"), is proud to be an Infor partner and a full-service provider of Infor CloudSuite and Infor Lawson ERP Application software consulting and managed services. Our firm specializes in Infor managed services, application support, migrations, and integrations. Based in Dallas, Texas, we have a nationwide network of consultants. Since our inception in 1999, we have offered clients a broad range of expertise in financials, procurement, human resources, payroll, budgeting, technical administration, and analytics. Our consultants and application experts consistently deliver results that exceed expectations.

Our Services and Expertise

Cendien's consulting and managed services are built on a foundation of proven partnerships, delivering a skilled and experienced team to address all Infor CloudSuite needs. Our Infor Application Managed Services encompass implementations, migrations, upgrades, ongoing support, and regular maintenance, all performed by Infor-certified consultants. These consultants are trained through Infor Campus and instructor-led courses, ensuring they are well-equipped to meet your support needs. While our work is primarily performed remotely to minimize travel expenses, we can provide onsite support upon request and approval.

Our Qualifications

Cendien, an Infor-certified partner and full-service provider, is uniquely qualified to deliver the support services you need and request in the RFP. Our team includes some of the most respected Infor consultants in the nation, with 15 to 25 years of experience in Infor Lawson and CloudSuite. Our references and work history demonstrate our ability to successfully complete complex projects.

Our Commitment to Excellence

We deliver outstanding customer service through our highly experienced team of Infor consultants. Our remote work model helps minimize travel expenses, but we are flexible and can provide onsite support if needed. Our pricing is based on a time and materials cost structure with a highly competitive blended rate for Managed Services. Our deep industry knowledge, combined with our commitment to excellence, makes Cendien your ideal Infor Support partner. We strive to exceed expectations and ensure your systems operate seamlessly, providing you with the highest level of support.

Company Information

| Company Profile | |
|--|-------------------------------|
| Legal Name (as on W9 Form) | Arisma Group LLC, dba Cendien |
| Ownership Structure | Corporation |
| State of Incorporation | Texas |
| Date of Incorporation | 1999 |
| Number of years in business | 20+ years |
| Years involved with services requested | 20+ years |



| | | |
|----------------------------------|----------------|--|
| Total number of employees | | 40+ Consultants |
| Partnerships | | Microsoft, Oracle, PeopleSoft, Infor, AWS |
| Certifications | | Certified Infor Partner, Certified Delivery Partner, Minority Certified Vendor (MBE-Minority Business Enterprise), NCTRCA Minority Certified Vendor (MBE) HMMB47549N0725 |
| Point of Contact | Name | Israel Denis |
| | Address | 1846 E Rosemeade Parkway Suite 200, Carrollton, TX 75007 |
| | Phone | (214) 245-4580 office (888) 353-6744 (214) 202-5896 cell |
| | Email | vendor@cendien.com |
| Website | | https://cendien.com |
| FEIN | | 20-2859158 |
| UEI | | KLD6QM2MTNX5 MKXYFPN734H3 |

With Cendien's Infor CloudSuite Managed Services you will receive:

| | |
|--------------------------------|---|
| Best in Class Tools | For system monitoring, remote support, service requests, and configuration management. |
| Excellent Expertise | Expertise in implementing and optimizing Infor solutions. A dedicated team committed to delivering high-quality services. |
| Round the Clock Support | We work and provide 365/24/7 remote support. |
| Best Practices | Cendien service desk keeps your team focused and reduces downtime. |
| Peace of Mind | From a team of experts constantly monitoring your systems, while providing Infor support services. |
| Industry Standards | Compliance with industry standards and certifications. A focus on helping you achieve your business goals. |

Our team will manage and support your Infor applications, quickly addressing issues and anticipating user needs. We integrate seamlessly with your team, providing comprehensive support for your Infor CloudSuite applications. Our experts handle both immediate issues and ongoing projects, such as developing reports, creating dashboards, managing interfaces, applying patches, handling migrations, and implementing necessary changes. This approach ensures smooth operation, minimizes issues, and enhances user satisfaction. We look forward to building a successful and lasting partnership with you.

Infor Partnerships

Cendien's strategic partnerships with Infor and Microsoft underscore its reputation as a leading player in the industry. These alliances not only validate Cendien's expertise but also provide access to specialized resources and support, enhancing the company's ability to deliver exceptional services to its clients. With a team of highly skilled professionals proficient in various technologies and armed with extensive experience, Cendien is well-positioned to continue offering tailored support solutions that meet the evolving needs of its clients, thereby solidifying its status as a trusted partner in enterprise technology consultancy and managed services.

As an Infor partner and comprehensive provider of Infor software consulting and managed services, Cendien is fully equipped to support the City of Fort Lauderdale. We have extensive experience in support services, custom development, complete installations, system conversions, application migrations, and environment upgrades. Our expertise in the Infor CloudSuite space is backed by numerous successful projects with Infor clients. And since inception, we have supported clients in Human Capital Management, Supply Chain Management, Financials, and Infor Technology. Our subject matter experts (SMEs) are proficient in IPA, Birst, Config Console, Reports, IBI, BODs, ION, and LPL coding for various reports and interfaces. Each consultant brings functional, technical, and business experience, working collaboratively with our engagement teams to achieve success for our customers. Our references and project history showcase an extensive list of clients we have partnered with and helped to succeed, stepping in to resolve issues and bring complex projects to fruition when other firms could not. We are well-prepared to handle application support, upgrades, migrations, development, and special projects.

Firm Financials

Cendien is a privately owned company, and while our financials are not publicly disclosed, we can confirm that we are in good standing with all regulatory entities at both the state and local levels, including the IRS. We have no litigation, pending legal matters, or liens, have never filed for bankruptcy, and maintain excellent credit ratings. Additionally, the firm has no past or pending judgments or lawsuits, and we are proud to report that we have never defaulted on any contract. For the fiscal year ending December 2023, our net revenues were between \$3 million and \$5 million. A letter of good standing from our CPA is included for your reference. We are also happy to provide current financials prior to any awards to verify our revenue.

Cendien Managed Services Differentiators:

- Infor Certified Partner
- Commitment to Quality and Delivery Excellence
- US Based (Dallas, Texas) Consulting & Managed Services Firm
- Experienced Infor Managed Services and Consulting Team
- Passion, Industry Experience, Deep Expertise, Utmost Professionalism
- Consistently Drive On-Time, On-Budget Delivery of Support
- A close relationship with Infor that allows us to provide leveraged leadership
- Executive leadership that is readily available and committed to achieving the desired results
- Excellence at planning, execution, and measurements of Services Programs

Key Benefits of Our Managed Services:

- Access to High-Performance Skills
- Predictable and Manageable Budgets
- Scalability and Enhanced Performance
- Proactive Issue Resolution
- Comprehensive Support
- Focus on Core Business
- Continuous Improvement

Cendien consistently delivers high-quality work, meets or exceeds project timelines, manages costs effectively, and maintains a dedicated back-office team for contract administration and compliance. Our consultants have extensive experience with multiple clients, implementations, and Infor support services, making us well-equipped to handle the Infor CloudSuite consulting and managed services support needed by the City of Fort Lauderdale.

Section 2 – Experience and Qualifications

Indicate the firm's number of years of experience in providing the professional services as it relates the work contemplated. Provide details of past projects for agencies of similar size and scope, including information on your firm's ability to meet time and budget requirements. Indicate the firm's initiatives towards its own sustainable business practices that demonstrate a commitment to conservation. Indicate business structure, IE: Corp., Partnership, LLC. Firm should be registered as a legal entity in the State of Florida; Minority or Woman owned Business (if applicable); Company address, phone number, fax number, E-Mail address, web site, contact person(s), etc. Relative size of the firm, including management, technical and support staff; licenses and any other pertinent information shall be submitted

Cendien has been providing professional Infor services since 1999, accumulating over 25 years of experience. As a Certified Infor Partner with a team of over 40 Infor Consultants, we have expertise in managing and supporting Infor applications across a broad spectrum of clients. Our firm is structured as a Limited Liability Company (LLC) and is registered as a legal entity in the State of Florida. We are also proud to be an NCTRCA Minority Certified Vendor (MBE) with certification number HMMB47549N0725.

We have successfully completed numerous projects for agencies of similar size and scope, consistently meeting both time and budget requirements. For example, we partnered with the Regional Transit Authority (RTA) in Chicago, Illinois, to provide comprehensive management and support for their Infor Applications. This project involved implementing an ERP Roadmap to enhance application functionalities, resolve complex system issues, and improve reporting mechanisms. Our team provided both functional and technical expertise, ensuring the project stayed on track and within budget.

Another notable project was with the Santa Clara Valley Water District in Santa Clara, California. We developed various reports using Birst, IPA, and ISD, and provided ongoing support for the deployment of Infor CloudSuite applications. Our ability to expedite report development and optimize business processes was highly appreciated by the client. Additionally, we created a much-needed enhancement to their timesheet form, which reduced time entry and improved user experience across the organization—work that even Infor could not tackle.

For more information on our projects, please refer to **Section 04 – Client References**.

Our firm consists of over 40 professionals across management, technical, and support roles, all committed to providing top-notch services. We hold multiple licenses and certifications, including being a Certified Infor Partner.

Expertise and Experience

Cendien's Infor CloudSuite Managed Services are meticulously crafted to deliver exceptional support, eliminating the complexities and high costs often associated with traditional service agreements. By partnering with us, the City of Fort Lauderdale will benefit from our extensive business applications expertise, deep industry knowledge, and dedicated support from a team proficient in the latest Infor functionalities.

Our team's vast experience ensures that your users will gain the confidence and skills necessary to manage Infor applications effectively for the long term. We offer comprehensive support across a broad spectrum of Infor areas, including but not limited to:

- **Human Capital Management (HCM):** Streamlining HR processes and enhancing employee engagement.
- **Supply Chain Management (SCM):** Optimizing procurement, inventory, and logistics operations.
- **Financial Management:** Improving financial reporting, budgeting, and compliance.

- **Technology and Infrastructure:** Ensuring robust and scalable tech solutions.
- **Analytics and Business Intelligence:** Providing insights through advanced data analysis and reporting.

Our commitment to excellence means that the City of Fort Lauderdale will receive tailored solutions designed to meet your specific needs, ensuring smooth operations and successful project outcomes. With Cendien, you are not just getting a service provider; you are gaining a trusted partner dedicated to your success.

By choosing Cendien, you are ensuring that your Infor applications are managed by experts who are committed to your success.

Our Infor expertise encompasses a wide range of areas, including but not limited to:

- **Continuous Updates:** Regular updates and optimizations to keep your Infor applications aligned with evolving business needs.
 - **Best Practices:** Ongoing training sessions to ensure your team stays current with the latest Infor features and best practices.
 - **Enhance Uptime:** 365/24/7 Support, round-the-clock assistance to address any issues promptly and minimize downtime.
- System Implementations
 - Optimization of Infor Lawson solutions
 - Assistance with Infor Lawson functionality
 - Industry-specific insights and best practices
 - Ongoing support and technical guidance
 - Managed Services and Ongoing Support

| Areas of Expertise | |
|---|--|
| <ul style="list-style-type: none"> • Infor Tech – System Administration • Infor Tech – LPL, ION, IPA, BODs, Security • Infor OS and Infor LTR, Infor Async • Infor Tech – Landmark Async • Intelligence – LBI, Birst, ISD, BI FSM, Crystal | <ul style="list-style-type: none"> • Functional – CloudSuite WFM • Functional – CloudSuite HR & Payroll • Functional – Infor WFM (Workforce) • Functional – CloudSuite SCM / Financials • UKG Kronos, Cognos, ADP, BSI Taxfactory, MHC, etc |

Technical and functional understanding of various modules, including:

| | | |
|--|--|--|
| <ul style="list-style-type: none"> • Recruitment • Human Resources • Benefits • Payroll • Time Management | <ul style="list-style-type: none"> • General Ledger • Accounts Payable • Accounts Receivable • Requisition • Purchasing | <ul style="list-style-type: none"> • Contracts • Budget Control • Inventory • Financials • Reports & Interfaces |
|--|--|--|

Support and Customization Abilities

- **Ongoing Technical and Functional Support:** We provide continuous technical and functional support for Infor CloudSuite, ensuring your systems run smoothly and efficiently.
- **Customization Development:** Our team is proficient in developing customizations tailored to your specific needs, implementing configuration changes, and troubleshooting system issues to maintain optimal performance.

- **Security Administration:** We handle all aspects of security administration, ensuring your data and systems are protected against potential threats.
- **Workflow, Report, and Interface Development:** We are skilled in configuring, designing, and developing custom workflows, reports, and interfaces to enhance your operational efficiency and provide actionable insights.

Our comprehensive support and customization services are designed to meet the unique requirements of your organization, ensuring that your Infor CloudSuite applications are fully optimized and aligned with your business goals

Maintenance and Solutions

Coordinate monthly CU (Cumulative Update) maintenance activities with functional users Our team has extensive expertise in creating custom solutions for Infor CloudSuite using a variety of tools, including:

- Configuration Console / Infor LPL (Landmark Pattern Language)
- File Creation Utility / Infor Spreadsheet Designer
- Infor ION (Intelligent Open Network)
- Infor BODs (Business Object Documents)
- Infor IPA (Intelligent Process Automation) & LPA (Lawson Process Automation)

Advanced Technologies

Profound experience with CloudSuite Landmark and LSF technologies, including:

- Infor OS
- Infor Mingle
- Infor ION
- Infor IPA
- Infor BI (Business Intelligence)
- Orchestration
- Replication Sets
- Async (Asynchronous Processing)
- Data Lake
- Infor Birst

Reporting and Personalization

In-depth familiarity with:

- List Reports & Customizations
- Personalization & Configurations
- Dashboards & System Console
- Lawson Business Intelligence (LBI)
- Crystal Reports
- Infor BI / Business Analytics
- Infor Birst & Infor Reporting
- ISD (Infor Smart Office Design)
- MS Add Ins
- App Studio and Dashboards

Cendien's Thought Leadership & Webinars

As industry pioneers, Cendien is at the forefront of thought leadership in Infor business process improvements and automation. Leveraging our extensive experience and deep understanding of Infor technology—including CloudSuite HCM, FSM, WFM, Infor OS, Birst, BI FSM, and Configuration Console—we consistently deliver valuable expertise to our clients.

Our senior team actively participates in top-tier conferences and user groups, sharing insights and best practices that resonate with the Infor community. These engagements allow us to stay ahead of industry trends and continuously refine our strategies to better serve our clients.

Our webinars are a testament to our commitment to knowledge-sharing, attracting a diverse audience eager to learn from our experts. These sessions cover a wide range of topics, providing attendees with actionable insights and practical advice on leveraging Infor technologies to their fullest potential.

Looking ahead, we are dedicated to expanding our thought leadership initiatives. We plan to broaden our webinar offerings, with upcoming sessions focusing on the complexities of Infor WFM. By leading the conversation and providing actionable insights, we aim to help organizations fully leverage Infor technologies, driving efficiency and innovation in their operations.

Section 3 – Approach to Scope of Work

Provide in concise narrative form, your understanding of the City's needs, goals and objectives as they relate to the project, and your overall approach to accomplishing the project. Give an overview on your proposed vision, ideas, and methodology. Describe your proposed approach to the project.

As a part of the response, a design plan and diagram(s) shall be presented to the City for approval. The Proposer shall also propose a scheduling methodology (timeline) for effectively managing and executing the work in the optimum time. The delivery time shall be stated in calendar days from the date of City notification of award or notice to proceed with delivery. Such timeline information and proposed dates shall include, but not necessarily be limited to: delivery, installation, acceptance testing, personnel, and other related completion dates, in accordance with the RFP specifications.

NOTE: The project must be completed and accepted within 120 days from the City Notice to Proceed. Also provide information on your firm's current workload and how this project will fit into your workload. Describe available facilities, technological capabilities, and other available resources you offer for the project. Additionally, the proposal should specifically address: A. Who, B. What, C. When, D. Where, E. Why, F. How

Understanding of the City's Needs, Goals, and Objectives

The City of Fort Lauderdale requires comprehensive managed services to support its Infor CloudSuite ERP system, which includes modules for financial management (FSM), supply chain management (SCM), and human capital management (HCM). The primary goal is to enhance production support, ensuring smooth and efficient operations across various municipal services such as administration, public works, water and sewer utilities, parks and recreation, planning, permitting, code enforcement, public safety, and parking services.

Project Definition

The City seeks contract managed services from an Infor certified partner to provide comprehensive application support for various CloudSuite modules which include financial management (FSM), supply chain management (SCM), human capital management (HCM), BIRST analytics, and reporting.

Support Objectives

- **Primary Objective:** Deliver application support for Infor CloudSuite Financials, Supply Management, HCM, and Payroll. This includes ensuring the smooth operation and optimization of these modules to meet the City's needs.
- **Secondary Objective:** Manage special projects as they arise, with specific scopes of work provided on a per-project basis. This ensures flexibility and responsiveness to the City's evolving requirements.

Work Schedule

- **Weekly Hours:** Provide managed support services for approximately 25 hours per week, totaling 1300 hours per year.
- **Regular Hours:** Operate during standard business hours from 8:00 am to 5:00 pm (Eastern Standard Time), Monday through Friday.
- **Additional Hours:** Any additional hours required due to varying work assignments will be billed as incurred, ensuring that all necessary support is provided without interruption.

This approach ensures that the City receives consistent, high-quality support tailored to its specific needs, while also allowing for the flexibility to address special projects and additional requirements as they arise.

Resources and Experience

- **Technical & Functional Resources:** Must have experience with Infor modules such as Absence Management, Compensation & Benefits, Payroll, Performance Management, Accounts Payable, Accounts Receivable, Asset Management, General Ledger, Grants Accounting, Event Sourcing, Treasury, BIRST, and Reporting.
- **Experience Requirements:** Relevant experience in Infor CloudSuite, ability to assess and recommend business process improvements, configure modules, communicate with stakeholders, support go-live activities, and perform functional testing.

General Requirements

- Provide Infor resources with sufficient experience.
- Ensure resources are available for replacement or supplemental needs.
- Provide management oversight and ensure resources are dedicated primarily to the City.

Proposed Vision and Methodology

Our Managed Services will provide the City with robust, reliable, and responsive managed services that optimize the performance and utilization of the Infor CloudSuite system. We aim to achieve this through a combination of proactive maintenance, expert support, and continuous improvement initiatives.

Cendien's Approach to Accomplishing Managed Services

Cendien's approach to the project involves several key steps to ensure comprehensive and effective support. We begin with a thorough assessment of the current Infor CloudSuite environment and develop a detailed project plan. To facilitate seamless communication and track documentation, a SharePoint site is created for recording all relevant information, including documentation, meetings, notes, user guides, and resources. Access to our Support site and the client SharePoint site is granted as part of the onboarding process.

A dedicated team of Infor-certified professionals is assigned to the project, including a client project manager and a client success manager, with backup resources available to ensure continuity of support. Our team provides ongoing technical and functional support, promptly addressing system issues and implementing necessary configuration changes. We also develop custom workflows, reports, and interfaces to meet specific business needs. Specific projects are reviewed, discussed, and scoped out, with a formal work breakdown structure established. Formal approval for projects exceeding 40 hours is obtained and signed off before work begins.

Monthly maintenance and updates are coordinated to keep the system current with the latest patches and enhancements. We offer ongoing training sessions to enhance the skills and confidence of City staff in managing Infor applications, supported by comprehensive documentation and user guides.

Finally, we constantly monitor system performance, identify areas for improvement, and implement best practices to optimize efficiency and effectiveness. This structured approach ensures that the City of Fort Lauderdale receives reliable, high-quality support tailored to its specific needs.

- **Assessment and Planning:**
 - Conduct a thorough assessment of the current Infor CloudSuite environment.
 - Develop a detailed project plan outlining key milestones, deliverables, and timelines.
 - Assign a dedicated Project Manager and Client Success Manager.
 - Create Client Specific SharePoint Site.
 - Begin the Onboarding Process and identify key Client Contacts.

- **Resource Allocation:**
 - Assign a dedicated Project Manager and Client Success Manager.
 - Assign a team of Infor-certified professionals with expertise in FSM, SCM, HCM, and BIRST analytics.
 - Ensure availability of backup resources to cover any extended absences and maintain continuity.
 - Setup Meeting Cadence for Frequent meetings.
- **Technical and Functional Support:**
 - Provide ongoing technical and functional support for all Infor CloudSuite modules.
 - Address system issues promptly and implement configuration changes as needed.
 - Develop custom workflows, reports, and interfaces to meet specific business requirements.
 - Get constant and regular feedback during weekly meetings of issues and projects.
- **Maintenance and Updates:**
 - Coordinate monthly Cumulative Update (CU) maintenance activities with functional users.
 - Ensure the system is up to date with the latest patches and enhancements.
- **Training and Development:**
 - Offer training sessions to enhance the skills and confidence of City staff in managing Infor applications.
 - Provide documentation and user guides to support ongoing learning and development.
- **Performance Monitoring and Optimization:**
 - Monitor system performance and identify areas for improvement.
 - Implement best practices to optimize system efficiency and effectiveness.

Cendien Managed Services and Deliverables

Cendien will provide reliable and comprehensive production support for Infor CloudSuite HCM, Payroll, Financials, and Supply Management to the City of Fort Lauderdale. Our team will work closely with the City to develop robust technical solutions using Landmark tools. We will troubleshoot and resolve issues related to HCM, FIN, and SCM modules, ensuring smooth system operations and maintenance of integrations. Additionally, we will design, develop, test, and deploy customizations to enhance system functionality. Our services include developing ad-hoc dashboards and reports using Birst Analytics to support decision-making processes. We will also assist in testing monthly patches and biannual updates to maintain system stability and performance. By partnering with Cendien, the City of Fort Lauderdale will benefit from our expertise and commitment to maintaining and enhancing their Infor CloudSuite environment, ensuring optimal performance and reliability.

Cendien's Infor Managed Services Portfolio

At Cendien, trust is the cornerstone of our business relationships. We take this responsibility seriously, working closely with you to assess your critical support needs and deliver a tailored program that aligns with your business and budgetary requirements. Our commitment to your long-term success ensures we are with you every step of the way. For over a decade, Cendien has been a leader in providing managed services for Infor systems. Our expertise spans from technical operations and managing extensions to supporting critical business users and beyond.

Our Infor Managed Services Support Program is designed to alleviate your challenges, reducing complexity and daily demands on your departments. This allows your team to focus on your most important business priorities. Our consultants bring a wealth of experience and dedication, ensuring you receive the highest level of support and service.

Scope of Work For Services to be provided by Cendien

Cendien will maintain a sufficient pool of resources to meet the requirements outlined in the Scope of Work for providing Managed Services to the City of Fort Lauderdale. This includes providing replacement or supplemental consultant as needed due to extended illness, vacation, or other extended absences of assigned personnel, as well as for succession planning if an assigned resource is no longer employed by Cendien. Additionally, Cendien will provide management oversight of the resources assigned to the City, ensuring they receive opportunities for mentoring, continuing education, and professional development training, given the potential extended nature of the assignments.

Cendien will also provide a primary point of contact to discuss performance issues, schedule work, and handle other contractual matters. Furthermore, Cendien will meet with the City on a quarterly basis to review program status, performance issues, and other contract matters as needed. This will be the duties of the client project manager and the client success manager, along with the practice director.

- **Extended Absence:** Defined as an absence of two or more weeks.
- **Resource Replacement:** If resources need to be replaced, either temporarily or permanently, Cendien will provide resumes to the City for review within three (3) days of the City's request.
- **Comparable Experience:** Replacement resources will have comparable experience to those being replaced, ensuring continuity and quality of service.
- **Dedicated Resources:** Resources assigned to the City will be primarily dedicated to the City with limited other work assignments. They will remain assigned to the City unless one of the following occurs:
 - The City requests the removal of the resource.
 - The resource is no longer able to perform their duties due to extended leave.
 - The resource is no longer employed by Cendien.

Cendien will provide a comprehensive team of experts to support the managed services project for the City of Fort Lauderdale. Our team will include the following roles:

| Cendien's Infor CloudSuite Roles | |
|--|--|
| Project Manager | Security Design Consultant |
| Financial Consultant | Security Administrator |
| Supply Chain Management (SCM) Consultant | Program Developer Consultant |
| Infor HCM and Payroll Consultant | Systems Administrator / Technical Consultant |
| Infor Benefits Administrator | Birst, ION, IPA Developers |
| Mingle / Infor OS Administrator | Database Administrators |

Below is a summary and highlights of our Infor CloudSuite Managed Services offerings:

- Change Management
- Version Management
- Daily Operation Support
- Root Cause Analysis & Issue Resolution
- Management of Infor Apps / Environments
- Ongoing Support Services for Infor applications
- 24x7 system support and monitoring
- Custom Modifications Management and Support
- Systems Monitoring and Performance Tuning
- Application Helpdesk and Service Coordination
- Technical and Procedural Documentation
- System Testing and Application Audit Support
- Database Management and Support
- Recovery and Archive Support

- Maintenance, Patching, Regulatory Updates
- Baseline & Performing Monthly Health Check
- Production Go-Live Support
- Infor BI and Birst Reporting

Analytics and Reporting

- Custom report development using Infor Business Intelligence, Birst, or Application Studio
- Modification of ICS-delivered reports with Birst, Infor Spreadsheet Designer, FCU
- Creation of visual dashboards as needed in Birst, IBI, LBI, ISD, FCU
- Development of customized programs and scripts that leverage Infor web services (ION)

Release Management

- Review, Testing, Analysis, Identification and Communication of impacts for updates
- Advocacy for Client enhancement requests

Business Processes

- Reporting and compliance, to include all federal reporting requirements and Crystal report needs
- Development of budgeting process using Infor d/EPM
- Business analysis to establish requirements for any system or process modifications
- Documentation of business process interactions in Infor
- Develop and administer task-specific training (not classroom training)
- Create new and/or update training documentation such as guides or visual aids, for future users – including changes based on monthly updates

System Administration

- Modification of Delivered Security Roles
- Environment management including defining release process, testing requirements, and data validation
- Installation, configuration, and use of the following Infor applications:
 - MS Add Ins
 - Infor Spreadsheet Designer (ISD)
 - Application Studio
 - Infor Rich Client
 - Infor Process Automation (IPA)
 - Infor Document Management (IDM)
- Address staff questions related to Infor system functions
- Troubleshooting support
- Process Automation
 - Modification of User Defined Processes
 - Creation of new workflows
 - Configuration of third-party system interfaces
- Other System Admin Support:
 - Support with data and user security issues
 - Support and development of reports and dashboards
 - Building legacy data warehouses and archiving

Our organization is committed to providing a comprehensive suite of services to support your project needs. These services encompass the following:

- Support for all issues with Infor environment and application
- Support with creating, modifying, disabling user access within the system

- Support with custom programs, interfaces, and reports including flows, Birst, IBI/LBI
- Support and Apply, Validate and Test Application Upgrades and Critical Updates
- Apply, Validate and Environment Upgrades and System Enhancements
- Conduct minor platform upgrades, hotfixes, and patches (applications / environment)
- System monitoring & security compliance as per procedures & industry Best Practices
- Infrastructure configuration support for each environment of Infor
- Database management and support of upgrades, hotfixes, and patches
- Data refreshes

Cendien's Managed Services is designed to empower the City by leveraging senior and seasoned expertise along with advanced technology to achieve its business goals, reduce operational costs, and maintain a competitive edge in a rapidly evolving tech environment. Through this partnership, the City will benefit from a comprehensive range of consulting services and deliverables, including:

- **Comprehensive Analysis:** We will evaluate the current Infor applications to identify areas for improvement and optimization, ensuring the system operates at peak efficiency.
- **Customized Plans:** Our team will develop tailored strategies for the deployment and integration of Infor solutions, aligning with the City's specific needs and objectives.
- **Ongoing Support:** We provide continuous support to ensure the smooth operation of Infor systems, addressing any issues promptly and effectively.
- **Training and Development:** We offer training programs to enhance the skills of City staff, enabling them to use Infor applications effectively and confidently.
- **Monitoring and Reporting:** Regular assessments of system performance will be conducted, with detailed reports generated to track progress and outcomes, ensuring transparency and accountability.

Key benefits of our Infor Managed Services include access to high-performance skills, predictable and manageable budgets, and a qualified team ready to help as needed. By partnering with Cendien, the City will not only optimize its Infor investments but also enhance its overall technological capabilities. This collaboration ensures long-term success and sustainability, enabling the City to thrive in a competitive and fast-changing environment.

Cendien offers the following to help in planning, managing and executing all support efforts:

| Active Program Manager | Weekly Status Reports |
|---|---|
| <ul style="list-style-type: none"> • Ensures Service Quality • Escalations | <ul style="list-style-type: none"> • Ticket Status • Staff Hours Report |
| Monthly Priority Reviews | Quarterly Review Session |
| <ul style="list-style-type: none"> • Monthly review of initiatives • Skillset planning sessions | <ul style="list-style-type: none"> • Review Overall Performance of Program • On-Demand/Project Roadmap Planning |

Cendien's Infor Managed Services are divided into several key categories each designed to provide full support and optimization for your Infor applications:

- **Business Application Support:** We offer Infor support to address technical and functional issues, provide basic guidance, and troubleshoot system problems quickly. When a ticket is opened, a consultant is assigned to resolve it, while a client success manager monitors the ticket to ensure prompt closure. If escalation is needed, it is handled by either the client or the client success manager, ensuring efficient problem resolution.

- **Application Administration:** Our team maintains and monitors your Infor applications, handling system administration, error handling, and application monitoring to ensure your applications perform as expected. This includes monitoring batch job queues, LSF administration logs, Async, IPAs, BODs, workflows, and other relevant components.
- **Lifecycle Management:** We manage customizations and modifications to adapt to changing business requirements and application updates. Cendien ensures that all extensions are managed, supported, and updated as needed to meet your business needs. As new requirements arise, we use Infor's extensibility tools to create new customizations and modifications, keeping your system aligned with your evolving business strategies.
- **Version Management:** Cendien conducts personalized impact release analyses to quickly identify and test proposed changes, enabling you to make informed decisions with confidence. We test version changes to ensure that customizations and modifications remain intact even after Infor's quarterly updates, providing a team of resources dedicated to reviewing changes and versions.
- **Technical Services:** Our technical services combine application maintenance and business continuity management to optimize the availability, performance, and continuity of your Infor applications. We assist with security migrations, support custom workflows and processes, manage user maintenance, and handle data replications, ensuring your system remains robust and reliable.
- **Development Support:** You have access to a wide range of application tools for developing solutions, including Infor Lawson Business Intelligence (LBI), Birst, ION, IPA, Crystal, MS Add-Ins, 4GL COBOL/CASE, and others. Our skilled team of developers is ready to assist with all your development needs, creating tailored solutions to enhance your system's capabilities.

By leveraging Cendien's Infor Managed Services, the City can ensure that its Infor applications are optimized for performance, aligned with business goals, and supported by a team of seasoned experts. This comprehensive approach helps the City maintain a competitive edge, reduce operational costs, and achieve long-term success in a rapidly changing tech environment.

Cendien Support Hours

Our service agreement provides comprehensive 24/7/365 support for Infor systems and all components integral to normal operational activities. Our team is accessible via phone, email, or online ticketing systems, ensuring the highest level of service and responsiveness.

| Item | Description |
|---------------------|---|
| Service Hours | Monday – Friday (8:00am – 6:00pm) |
| After Hours | Monday – Friday (6:01pm – 7:59am) Weekends & Holidays |
| Consulting Services | Application Support, Functional, Technical, System Admin and Development User Support |
| 24x7 Service Desk | Client submits tickets through a 24/7/365 service desk which will be assigned to the Infor Applications Management (AMS) Team with a response SLA - Phone, Email, Chat and Self-Service Ticketing |

Priorities, Levels and Response

The service levels outlined in the table below are applicable only to requests made during standard service hours. Critical and high-priority requests submitted after hours will receive a response within four (4) hours. All other after-hours requests will be addressed starting from the next business day.

| Priorities | Definitions |
|----------------------|---|
| 1. Critical / Urgent | Mission critical business processes or function cannot be completed or is non-operational. |
| 2. High | Mission critical business processes or function is significantly impaired but is operational. |
| 3. Medium | Business operations are impacted but not to a significant degree however productivity is moderately impacted. |
| 4. Low | Business operations are not impacted however productivity is slightly impacted or a work around for situation exists. |
| 5. Planning | The request is not impacting normal business operations and there is no urgency to complete the request. |

Initial Response Time is defined as the period between the created date and time of an incident or request within Cendien's service desk system and the date and time when Cendien's maintenance and support consultants contacts an authorized client resource regarding the request for service.

| Request Type | Priority Levels | Response Time | Target Resolution |
|--------------|-----------------|-------------------|-------------------|
| Incidents | 1 – Critical | 30 Business Min | 1 Business Day |
| | 2 – High | 1 Business Hour | 1 Business Day |
| | 3 – Medium | 4 Business Hours | 2 Business Days |
| | 4 – Low | 8 Business Hours | 2 Business Days |
| | 5 - Planning | 16 Business Hours | N/A |

Ongoing Daily Support

Cendien will utilize our ticketing system to manage the City daily support needs. This system allows us to efficiently track task assignments and monitor progress. Our team is available 24/7/365 days a year, to ensure all requests are promptly assigned and addressed.

Every Monday and Tuesday, we hold weekly meetings with our Consultant and Project Management teams to review client projects and issues. We prioritize the City of Fort Lauderdale's projects, handle escalations, and take all feedback seriously. Our clients consistently give us excellent reviews, praising our timely responses, expert knowledge, professionalism, and effective project execution. Cendien is committed to delivering high-quality service and ensuring client satisfaction.

Cendien's Managed Services Expertise Level

| Service | Level | Notes |
|---------------------------------------|--------|---|
| Infor Application Support (Technical) | Expert | Includes: Systems administration, Security Administration, Server and Application Maintenance, Application Updates. |

| | | |
|--|--------|---|
| Infor Application Support (Functional) | Expert | Application support in each of the Infor functional areas as needed. |
| Infor Interface Support | Expert | Support of all Interfaces In and out of Infor. |
| Business Analytics and Database Management | Expert | Optimizing database performance and building reports and dashboards. |
| Daily Operations Support | Expert | Daily support to end users via phone/e-mail/or helpdesk ticket submission |
| System Monitoring | Expert | Monitoring system performance, managing and optimizing system resources |
| Technical Documentation | Expert | Cendien to follow the best processes for technical documentation. |
| Infor ION, BODS, Birst | Expert | Support and create report development using BI, Birst, and App Studio. |

Cendien Help Desk

Our Helpdesk operates 24/7/365 days a year, ensuring timely issue resolution through continuous monitoring. To report issues and open tickets, please create an account at support.cendien.com. Alternatively, you can email us at support@cendien.com with a relevant subject line and a detailed description of your issue.

You will also have direct access to our Subject Matter Experts (SMEs) via dedicated contact numbers, teams account, allowing you to call them directly for ticket creation. Once tickets are generated, they are promptly assigned to our SMEs for swift resolution.

To ensure transparency and effective communication, the client-assigned Project Manager will participate in weekly business meetings with the City. During these meetings, the progress of individual tickets will be reviewed and discussed. This approach provides continuous updates on the status of development and resolution, fostering smooth collaboration and mutual understanding among all parties involved.

| Service Level Commitments | |
|--|--|
| Production Environment Mission Critical Incidents (PROD) | Response: Within 30 minutes Cendien will acknowledge the incident followed by a response by a qualified member of its staff to begin to diagnose and correct the Production Environment, Mission Critical problem and shall respond via the helpdesk within hour (1) hour. |
| Production Environment Normal Incidents (PROD) | Response: Cendien will provide an acknowledgment of submission of an incident by a qualified member of its staff to begin to diagnose and correct a Production Environment Normal problem within one (1) hour and shall log a formal response via the helpdesk in one (1) hour. |

| | |
|--|--|
| Test Environment Critical Incidents (TEST) | Response: Within one (1) hour Cendien will acknowledge the incident followed by a response by a qualified member of its staff to begin to diagnose and correct the High Severity problem and shall respond via the helpdesk within two (2) hours. |
| Test Environment Normal Incidents (TEST) | Response: Cendien will provide a response by a qualified member of its staff to begin to diagnose and correct the Test Environment, Normal problem and shall respond via the helpdesk within eight (8) business hours. |

| Services | Notes |
|--|--|
| Application Support (Technical) | Technical support includes systems administration, Security Administration, Server and Application Maintenance, and Application Updates. |
| Application Support (Functional) | Application support includes: WFM, HCM, FIN, SCM |
| Interface Support | Support of all Interfaces In and out of Application software |
| Business Analytics and Database Management | Optimizing database performance and building reports and dashboards. |
| Daily Operations Support | Daily support to end users via phone/e-mail/or helpdesk ticket submission |
| System Monitoring | Monitoring system performance, managing and optimizing system resources |
| Technical Documentation | Cendien to follow the best processes for technical documentation. |
| Business Intelligence (BI), ION, BODS, Birst | Support and create report development using BI, Birst, Applications Studio/BI FSM, and other reporting tools. |

Issue Resolution Process

When an issue is reported, our team follows a structured approach to ensure it is resolved efficiently. This process aligns with best practices to meet and exceed service level expectations:

- **Issue Registration:** The issue is assigned to a specific consultant or Subject Matter Expert (SME).
- **Preliminary Work:** The assigned individual begins working on a resolution.
- **Verification:** We confirm that the reported issue is genuine.
- **Engagement:** We communicate with the user to gather detailed insights.
- **Validation:** A meeting is held to discuss and validate the issue.
- **Issue Replication:** We replicate the issue to confirm it under defined circumstances.
- **Consultation:** If unresolved internally, we open a ticket with Infor for expert assistance.
- **Escalation:** Unresolved issues are escalated according to service level commitments.

- **Emergencies:** For critical or production issues, we initiate an online meeting with stakeholders for immediate problem-solving. We ensure that the entire team is available to help if it so requires it.
- **Cause Analysis (CA):** After resolution, we analyze the issue to prevent future occurrences.

Cendien's Effective Ticket Handling Process

- **Project Management:** Our Project Managers carefully oversee each ticket from assignment to resolution, ensuring appropriate escalation if needed.
- **Client Updates:** We provide weekly progress updates to clients for each ticket.
- **Root Cause Analysis:** Our Subject Matter Experts (SMEs) thoroughly investigate and document the root causes of issues. Once resolved, they promptly notify end-users.
- **Urgent Matters:** For urgent issues, tickets can be escalated to Cendien's Client Success Manager and Managing Director at any stage.

This structured approach ensures efficient ticket handling and maintains high client satisfaction.

| Responsibility | Party | Description |
|---|--------|--|
| Maintenance of the Infor Applications | Shared | Cendien will provide maintenance and support for the Infor Applications as required. |
| Infor Functional and Technical Support | Shared | Cendien will provide functional and technical support as requested by the client for Infor CloudSuite HCM, CloudSuite Financials (CSF), Supply Chain Management (SCM), Expense Management (XM) and MHC. |
| Maintenance and support of all Infor Interfaces and Flows (IPA) | Shared | Cendien will provide maintenance and support for the Infor Interfaces as required. Cendien will also develop new IPA, flows, ION Bods, and all technical development as requested by Client. |
| Reports and Database Support | Shared | Cendien will maintain and support the Infor Reports and Dashboards. Infor will support the Database if Client is on the cloud. New Fields and Relationships will be developed by Cendien to the extent possible. |
| Daily Operations Support | Shared | As it relates to Infor or related applications for ensuring optimal support. |
| System Monitoring | Shared | As it relates to Infor or related applications |
| Disaster Recovery | Shared | Client and Infor will be responsible for ensuring backup and replication are setup, working and functional. Cendien will assist with tasks related to Infor specifically as requested. |
| Tech Documentation | Shared | Documentation of system and application, project enhancements and any upgrades as required by client. |

| Responsibility | Party | Description |
|--|--------|--|
| Audit Support | Shared | Both Client and Cendien will provide support for any audit requirements. |
| Hardware and Network Support | Client | Client will provide Hardware and Network support. Cendien will make recommendations if asked. |
| New Development | Shared | Cendien will provide development expertise for any new development as required by the Infor apps. |
| Infor Upgrades / CloudSuite CU Updates | Shared | Infor will upgrade the CloudSuite Applications and Cendien will provide Version Management for Applications and Environment. |

| Cendien's Managed Service Functions | Cendien | Infor Support |
|-------------------------------------|---------|---------------|
| System Administration | X | |
| Daily System Checks | X | Some |
| Enhancement Requests | X | |
| Extended Hours Support | X | |
| Monitoring Services | X | |
| Service and Release Management | X | |
| Extensibility Support | X | |
| Ad Hoc Service Fulfillment | X | Some |
| Application Support | X | Some |
| Technical Consulting | X | |
| Data Correction | X | Some |
| Standard Product Support | X | X |
| Testing and Validation | X | |

Exceptions and Assumptions

- All Client or partner services not permitted by Infor as part of the Infor CloudSuite solutions.
- Support for services of on-premises devices including scanners/printers' hardware
- Support and services for products and applications not specifically noted within the RFP.
- Client will remain current with all Infor and third-party hosting, maintenance, and support agreements throughout the term of this SOW.
- The Client will provide Cendien with one or more Infor Support accounts to enable Cendien to submit and assist with Infor incidents.

Special Project: Infor Absence Management Post-Go-Live Audit

Project Overview: This project involves a thorough audit of the Infor Absence Management system after its go-live deployment. The goal is to ensure the system functions correctly, verify configurations, identify issues, and ensure it meets business requirements.

Project Goals:

- Validate correct configuration and functionality of the system.
- Identify and fix any post-deployment issues.
- Ensure compliance with policies and regulations.
- Provide a report with findings, recommendations, and action plans.

Scope of Work:

- **Pre-Audit Preparation:** Review documentation and schedule audit activities.
- **Configuration Verification:** Check system configurations, absence policies, accruals, and reporting functions.
- **Functional Testing:** Perform end-to-end testing, validate user roles, permissions, and data integrity.
- **Issue Identification:** Document discrepancies and assess system performance.
- **Stakeholder Interviews:** Collect feedback on system usability and functionality.
- **Reporting and Recommendations:** Create a detailed audit report with recommendations for ongoing monitoring and maintenance.

Work Breakdown Structure

Pre-Audit Preparation

- **Review Documentation:** Conduct a thorough review of all project documentation to gain a comprehensive understanding of the system setup and requirements. Meet with City staff to discuss any deficiencies and desired outcomes for the project, ensuring alignment with their expectations.
- **Assign Resources:** Allocate project resources, ensuring that the team is well-equipped to handle the audit. Document any identified deficiencies, desired outcomes, and areas for improvement to guide the audit process effectively.
- **Schedule Activities:** Coordinate and schedule all audit activities with relevant stakeholders. This includes setting up meetings, defining timelines, and ensuring that all parties are informed and prepared for the audit process. This step is crucial for ensuring smooth execution and minimizing disruptions.

Configuration Verification

- **System Configuration Check:** Verify that the system configurations align with the established specifications setup during the implementation. Ensure that all configurations are thoroughly documented and meet the City's expectations. Test various scenarios to confirm or identify deficiencies. Document any potential issues for later review with the City to ensure transparency and accuracy.
- **Policy and Function Setup:** Confirm the correct setup of absence policies, accruals, and reporting functions to ensure they meet business needs. If the business needs are not being met, thoroughly review all possible policies, configurations, and employee groups to identify any potential setup issues. This step is crucial for ensuring that the system supports the City's operational requirements effectively.
- **Documentation:** Meticulously document all configuration verification steps taken, including the personnel responsible for each step. This documentation will serve as a reference for future audits and help maintain accountability and clarity throughout the process.

Functional Testing

- **End-to-End Testing:** Conduct comprehensive end-to-end testing of core functionalities to ensure they operate as intended. Test various scenarios involving different employee groups, plans, accrual policies, and special cases. Compare these tests against what was tested during User Acceptance Testing (UAT) and Conference Room Pilot (CRP) phases. Document all findings, including deficiencies, policy and accrual errors, and any setup misconfigurations. This thorough testing ensures that the system meets all operational requirements and functions smoothly.
- **User Roles and Permissions:** Test user roles and permissions to verify that access levels and security settings are appropriate. Ensure that users have the correct permissions to perform their duties without compromising system security. Document any discrepancies and sign off to make the necessary adjustments to align with security protocols.
- **Data Integrity Validation:** Validate the integrity of data across the system to ensure accuracy and consistency. This involves checking data for errors, duplications, and inconsistencies. Ensure that data flows correctly between different modules and that all information is up-to-date and reliable. Document any issues found and propose solutions to maintain data integrity.

Issue Identification and Stakeholder Interviews

- **Document Discrepancies:** Record any discrepancies, issues, or errors encountered during testing. Review these findings with City staff to determine the best approach for addressing each discrepancy. Draft a detailed plan for fixing any potential issues, ensuring that all stakeholders are informed and involved in the resolution process.
- **System Performance Assessment:** Evaluate the overall performance of the system, including response times, load handling, and efficiency. Identify any performance bottlenecks or areas that require optimization. Document these findings and propose solutions to enhance system performance.
- **Security Setup Review:** Assess the security configurations to ensure that all settings are aligned with best practices and organizational policies. Verify that access controls, user permissions, and data protection measures are properly implemented. Document any security vulnerabilities and recommend corrective actions.
- **Plan Configuration Assessment:** Review the configurations of various plans, such as absence policies and accruals, to ensure they are set up correctly. Verify that these configurations meet the business requirements and are functioning as intended. Identify any misconfigurations and work with City staff to draft a plan for corrections.
- **Employee Group Classification:** Examine the classification of employee groups to ensure they are accurately defined and appropriately configured within the system. Identify any discrepancies in group classifications and document them. Collaborate with City staff to develop a strategy for addressing these issues.
- **Stakeholder Feedback:** Gather additional feedback from stakeholders regarding any issues or concerns they have encountered. This feedback can provide valuable insights into areas that may need further attention or improvement.
- **Conduct Interviews:** Interview key users and stakeholders to gather feedback on system usability and functionality. These interviews will help identify any pain points or areas where the system could be improved.
- **Collect Insights:** Use feedback from stakeholders to identify areas for improvement and ensure the system meets user needs. This step is crucial for aligning the system's functionality with the expectations and requirements of its users.

Reporting and Recommendations

- **Compile Audit Report:** Create a comprehensive audit report detailing all findings, issues, and suggested remediation steps. Include screenshots for test cases, scenarios, and findings to provide clear visual evidence. Identify deficiencies reviewed with the City and specify whether these deficiencies stem from

system setup, proper usage, system limitations, or lack of user experience. This detailed documentation will serve as a valuable reference for addressing issues and improving system performance.

- **Provide Recommendations:** Offer recommendations for addressing each identified deficiency. Develop a plan for fixing potential deficiencies, if applicable. Identify any system limitations that may be causing the deficiencies and suggest ways to mitigate these limitations. Recommend potential training programs if user experience is lacking, ensuring that users can effectively utilize the system. Additionally, propose ongoing monitoring and maintenance strategies to ensure long-term system usage is optimized.
- **Present Findings:** Present the audit findings to stakeholders in a clear and organized manner. Discuss the proposed action plan to address any identified issues, ensuring that all stakeholders understand the steps needed to resolve deficiencies and improve system functionality. This presentation will facilitate informed decision-making and foster collaboration among all parties involved.

Deliverables for Infor Absence Management Post-Go-Live Audit Special Project

The deliverables for this project include a pre-audit preparation document that outlines all pre-audit activities, validated test cases, reviewed configurations, considered plans, accrual policies, employee groups, and interview summaries. A configuration verification checklist is also provided to ensure all system elements are correctly set up. Additionally, a functional testing report documents the end-to-end testing of core functionalities, user roles and permissions, plan setups, accrual policy configurations and data integrity validation. An issue identification report records discrepancies, assesses system performance, and reviews security setups, plan configurations, and employee group classifications. A stakeholder interview summary highlights feedback on system usability and functionality. The comprehensive audit report details findings, issues, and suggested remediation steps, including screenshots and deficiency analysis. Recommendations and an action plan are provided to address deficiencies, propose training programs, and ensure ongoing monitoring and maintenance. The findings are presented to stakeholders to facilitate informed decision-making and collaboration.

Pre-Audit Preparation Document:

- **Overview:** A comprehensive document detailing all pre-audit preparation activities.
- **Test Cases:** A list of all test cases that were validated and verified during the preparation phase.
- **Configuration Reviews:** Documentation of configurations that were reviewed and confirmed, ensuring they align with the City's requirements.
- **Plans and Policies:** An outline of all plans that were considered and addressed, including accrual policies and employee groups.
- **Interview Summaries:** A summary of interviews conducted with personnel, including key insights and feedback gathered from these discussions.

Configuration Verification Checklist:

- **System Configurations:** A detailed checklist used to verify that all system configurations are correctly set up.
- **Verification Steps:** Specific steps taken to confirm the setup of absence policies, accruals, and reporting functions.
- **Documentation:** Records of who performed each verification step and the outcomes of these checks.

Functional Testing and Issue Identification Report:

- **End-to-End Testing:** Documentation of comprehensive end-to-end testing of core functionalities, including various scenarios with different employee groups and accrual policies.
- **User Roles and Permissions:** Results of testing user roles and permissions to ensure appropriate access levels and security.
- **Data Integrity:** Validation of data integrity across the system, ensuring accuracy and consistency.

- **Discrepancies & Issues:** A detailed record of any discrepancies, issues, or errors encountered during testing.
- **Assessment:** An assessment of system performance, including response times and load handling.
- **Configuration Review:** Findings from the review of security setups, plan configurations, and employee group classifications.

Stakeholder Interview Summary:

- **Feedback Collection:** Summaries of interviews with key users and stakeholders, highlighting feedback on system usability and functionality.
- **Insights and Recommendations:** Insights gathered from stakeholder feedback, identifying areas for improvement.

Comprehensive Audit Report:

- **Findings and Issues:** A detailed report summarizing all findings, issues, and suggested remediation steps.
- **Screenshots and Evidence:** Visual evidence, including screenshots of test cases, scenarios, and findings.
- **Deficiency Analysis:** Analysis of deficiencies, specifying whether they stem from setup, proper usage, system limitations, or lack of user experience.

Recommendations and Action Plan:

- **Remediation Steps:** Targeted recommendations for addressing each identified deficiency.
- **Training and Monitoring:** Suggestions for potential training programs and ongoing monitoring to ensure long-term system performance.
- **Presentation to Stakeholders:** A presentation of findings and the proposed action plan to stakeholders, facilitating informed decision-making and collaboration.

By delivering these comprehensive documents and reports, we ensure that the Infor Absence Management system is thoroughly audited, optimized, and aligned with the City's business requirements and user needs.

We offer our services on either an as-needed basis or as a fully managed service, allowing the City to scale support according to evolving business strategies and needs. This flexibility ensures that the City can adapt to changing circumstances without compromising on the quality of support. Our approach is designed to align with the City's long-term strategic goals and objectives, enabling the City to effectively leverage Infor CloudSuite modules and related software to enhance operational efficiency and achieve business goals.

Doing Business, The Cendien Way – Supporting City of Fort Lauderdale

This section outlines Cendien's business approach, detailing our onboarding and collaboration strategy with the City of Fort Lauderdale during the Consulting or Managed Services support periods.

Utilizing Freshworks Ticketing System

- **Objective:** Efficiently capture and track the City of Fort Lauderdale's IT orders, ensuring seamless task assignments and progress monitoring.
- **Strategy:**
 - **24/7 Monitoring:** Cendien's IT unit diligently monitors incoming requests around the clock to ensure prompt ticket assignments.
 - **Weekly Meetings:** Every Monday and Tuesday, the entire Consultant and PM Team gathers to review and follow up on client projects and issues.

- **Tools Employed:** We use the Freshworks ticketing system, known for its user-friendly interface and efficient tracking mechanism.

Feedback and Prioritization

- **Feedback Integration:** We adapt and evolve based on the City of Fort Lauderdale's feedback, prioritizing their project directives and concerns. We highly value their feedback to enhance project outcomes and foster a collaborative work environment.
- **Escalation Handling:** We promptly address any urgent issues, taking necessary measures to resolve them.

Excellence through Expertise

- **Objective:** Deliver superior services marked by professionalism and expertise. Our team of Subject Matter Experts (SMEs), renowned for their knowledge and experience, guide projects toward success by providing expert consultation.
- **Professional Conduct:** In every interaction, we uphold a high standard of professionalism, laying the foundation for a respectful and productive collaboration with our clients.

Our commitment is to uphold Cendien's legacy of providing impeccable support and executing projects flawlessly. We strive to meet and exceed the expectations set by positive reviews from our existing clientele. We ensure that our responses are not only quick but also effectively address any concerns raised by our clients. By championing a methodical approach to project execution, we guarantee successful delivery within stipulated timelines.

Onboarding Process with Cendien

Cendien ensures a seamless transition through our structured Service Onboarding process. Here's how it works:

Welcome Package

We begin by providing a comprehensive Welcome Package to the City of Fort Lauderdale, which includes several key components to ensure a smooth onboarding process:

- **Welcome Documents:** These documents provide an overview of our services, introduce our team, and outline what the City of Fort Lauderdale can expect from our partnership. They include detailed information about our support processes, contact information, and an introduction to our ticketing system.
- **Onboarding Checklists:** These checklists are designed to guide the City through each step of the onboarding process. They cover everything from initial setup and configuration to familiarizing the team with our tools and procedures. The checklists ensure that no critical steps are missed and help streamline the transition.
- **Onboarding Questionnaire:** This questionnaire helps us gather essential information about the City's specific needs and requirements. It includes questions about current systems, key contacts, and any immediate concerns or priorities. The responses allow us to tailor our support to meet the City's unique needs effectively.

By providing these comprehensive materials, we aim to facilitate a smooth and efficient onboarding experience, setting the foundation for a successful and collaborative partnership.

Explaining Support Components

To ensure the City is fully equipped to utilize our support services effectively, we provide detailed explanations of the following components:

- **Ticket System:** We familiarize the City with Cendien's Ticket System, which is designed for efficient Help Desk Support. This system allows users to report issues, track the status of their tickets, and receive timely updates. We provide a step-by-step guide on how to use the system, including how to create, update, and close tickets.
- **SharePoint Site and Notebook:** We introduce the collaborative tools we use, such as the SharePoint Site and Notebook. These tools are designed to foster teamwork by providing a centralized location for project documentation, meeting notes, and other important information. We demonstrate how to access and navigate these tools, ensuring that all team members can collaborate effectively.
- **Time Tracking Procedures:** We provide an overview of our time tracking methods to ensure transparency and accountability. This includes instructions on how to log hours worked, track project progress, and generate reports. We explain the importance of accurate time tracking for project management and billing purposes.
- **Weekly Business Meetings:** We discuss the cadence and modalities of the Hours Report Review during our weekly business meetings. These meetings are crucial for reviewing project progress, addressing any issues, and ensuring alignment with the City's priorities. We outline the agenda, frequency, and expected outcomes of these meetings.
- **Project Proposals:** We cover the format and requisites for submitting project proposals. This includes guidelines on how to outline project objectives, deliverables, timelines, and resource requirements. We provide templates and examples to help the City prepare comprehensive and effective proposals.
- **Samples:** To ensure clarity, we present samples of Hours Reports and Billing Invoices. These samples illustrate how we document and report on the work performed, ensuring that the City has a clear understanding of our billing practices and project tracking methods.

By thoroughly explaining these support components, we aim to empower the City to make the most of our services and ensure a smooth and productive collaboration. And by following this process, we guarantee a smooth transition and effective collaboration.

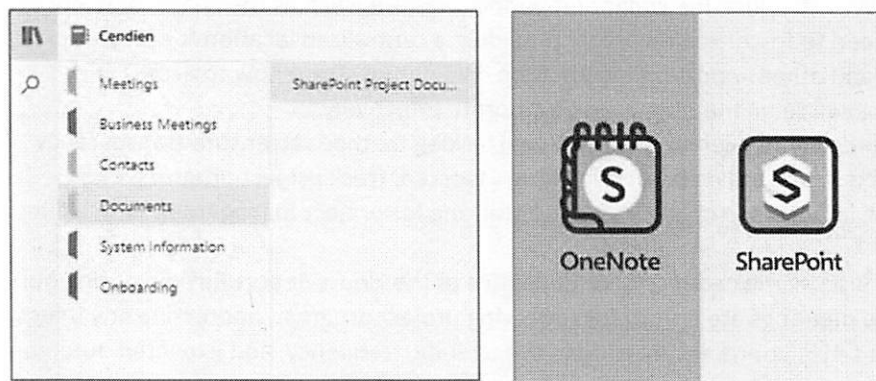
SharePoint Site and Notebook for Collaboration

The SharePoint Site and Notebook are essential tools for seamless collaboration with your team members. Here's how we utilize them to enhance our partnership with the City of Fort Lauderdale:

- **Centralized Project Tracking:** We use SharePoint to track all client projects, ensuring that every task, milestone, and deliverable is documented and easily accessible. This centralized approach helps keep everyone on the same page and ensures that no detail is overlooked.
- **Meeting Documentation:** All meeting notes, agendas, and action items are recorded in the SharePoint Notebook. This practice ensures that all discussions and decisions are documented, making it easy to follow up on action items and maintain continuity in ongoing projects.
- **Contact Information:** SharePoint serves as a repository for all relevant contact information, including key stakeholders, team members, and external partners. This centralized contact list ensures that communication is streamlined and that the right people are always informed.
- **Systems Information:** We document all systems and technical information related to the City's projects in SharePoint. This includes system configurations, user guides, and troubleshooting tips, providing a valuable resource for both current and future team members.
- **Weekly Business Meetings:** We use the information stored in SharePoint to prepare for and conduct our weekly business meetings with Client Leadership. During these meetings, we review the progress of

individual projects, discuss any issues or concerns, and plan the next steps. This structured approach ensures that all parties are aligned and that projects stay on track.

By leveraging the SharePoint Site and Notebook, we foster a collaborative and transparent work environment, ensuring that the City of Fort Lauderdale has the information and support needed for successful project execution.



RICE Documentation

To ensure comprehensive tracking and documentation of RICE (Reporting, Interface, Customizations, Extensions) components for the City of Fort Lauderdale, the Cendien Project Manager will collaborate closely with our Subject Matter Experts (SMEs). Here's how we manage this process:

- **Reporting:** We document all reporting requirements, including the design, development, and deployment of reports. This ensures that all necessary data is captured and presented in a format that meets the City's needs.
- **Interfaces:** We track and document all interface requirements, detailing how different systems will communicate and exchange data. This includes specifications, data mapping, and integration points to ensure seamless interoperability between systems.
- **Customizations:** Any customizations required to meet the City's specific needs are thoroughly documented. This includes the rationale for customizations, detailed design documents, and implementation plans. By doing so, we ensure that custom solutions are well-understood and maintainable.
- **Extensions:** We document all extensions, which are additional functionalities added to the existing system. This includes the purpose of the extensions, technical specifications, and testing procedures to ensure they enhance the system's capabilities without disrupting existing functionalities.

The Cendien Project Manager, in collaboration with our SMEs, ensures that all RICE components are meticulously tracked and documented. This comprehensive documentation process guarantees that the City has a clear and detailed record of all project elements, facilitating smooth project execution and future maintenance.

Management of Projects

Cendien employs a proven methodology to manage the City of Fort Lauderdale's special project requests. For any project expected to exceed 40 hours (or the agreed-upon limit), Cendien will prepare a detailed Project Proposal for approval. This proposal will encompass the project scope, technical specifications, current and future states, estimated hours, timeline, and the consultants assigned to the project.

The proposal covers key sections such as:

- **Project Overview:** Summary of objectives and key deliverables.
- **References:** Relevant past projects or case studies.
- **Problem Statement:** The issue the project aims to solve.
- **Proposed Solution:** Methods and technologies to be used.
- **Deliverables:** Expected outputs and outcomes.
- **Assumptions:** Planning assumptions that might affect the project.
- **Resources and Hours:** Required resources and estimated hours.
- **Timeline:** Project phases, milestones, and completion dates.

This structured approach ensures thorough planning and smooth execution for successful project outcomes.

Sample Section from a Cendien Project Proposal

| | |
|--|------------------|
| Project Leadership & Project Management | 16 hours |
| <ul style="list-style-type: none"> Work performed by Israel Demis & Linda VanTran Gebbia Project Discovery and Scope review Includes overall project leadership and management of the project Includes project management of Cendien and client resources, development, and execution of the Implementation Plan from Testing to Go Live of the deliverables, follow-up on issues and change requests, controlling scope and system integration assurance Status meetings and assistance with documentation and project communication | |
| Requirements Analysis Review and Design | 10 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti, Sharon Jordan, Lowell Luis, and Linda VanTran Gebbia Includes project discovery with end-users and write-up of the technical specification and proposal | |
| Interface Development and System Setup | 48 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti Includes all interface program development, testing, and deployment using Lawson 4SL Includes systems setup of program, tables, and data | |
| UAT Testing/QA | 24 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti, Lowell Luis, and Linda VanTran Gebbia Includes work with end-users from HR/Payroll/Finance/IT to conduct testing and sign-off in the Test Environment Data Input/Extract, Data Validation, Testing, and Training of new process in the Test Environment | |
| Production Support | 16 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti, Lowell Luis, and Linda VanTran Gebbia Includes testing and sign-off with end-users from HR/Payroll/Finance/IT Data Input/Extract, Data Validation in the Production Environment Preparation of the Go Live Plan to implement the new process in Production | |
| Total Estimate | 114 hours |

Timeline

This project will take 16 to 21 business days to complete (from the date given access) with an implementation date for Go Live in Production prior to <Date>.

| Milestones | Due Date | Status | Resource |
|--|------------------------------|-----------------------------|---------------|
| Requirements Analysis Review and Design | By 7/1/2021 | Completed | Lowell & Team |
| Access to SQL Server and Systems | By 7/2 or 7/5 at the latest | In Progress – Awaiting Erik | Erik/Damaris |
| AP Report Development – 1 st Draft Ready for Review | By 7/9 or 7/12 at the latest | Not Started | Nicole |
| AP Report – Data Validation/Testing/Sign-off | By 7/14 (Concord) | Not Started | Suzanne |
| AP Report – Sign-off | By 7/15 (Concord) | Not Started | Suzanne |
| AP Report Go Live | By 7/16 | Not Started | Linda/Nicole |

Please Note: System Setup, UAT Testing, and Go Live Implementation will require Client staff assistance (16-24 hours). If staff are unavailable, this will impact the timeline.

Project start date will be determined between Client and Cendien once project proposal is approved.

Time Tracking

At Cendien, we prioritize complete transparency in our ticket logging and billing processes to ensure clarity and trust with our clients. Our consultants meticulously document every detail of each ticket, including meeting names, work descriptions, and the duration of tasks. This thorough documentation allows us to maintain accurate records and provide clients with a clear understanding of the work being performed.

Our Project Managers (PMs) play a crucial role in this process by holding weekly Business Meetings with clients. During these meetings, we review the Hours Reports in detail, ensuring that clients are fully informed about the time spent on their projects and that there are no unexpected surprises. This regular review process helps to maintain transparency and accountability.

In addition to reviewing hours, these meetings serve as a platform to discuss ongoing projects, ticket statuses, and the overall direction of the business. We also address any issues or concerns that may arise, fostering open communication and collaboration. This proactive approach is essential for maintaining high levels of customer satisfaction, as it ensures that clients are always aware of the project's progress and any potential challenges.

By emphasizing transparency and regular communication, Cendien builds strong, trusting relationships with our clients, ensuring that their needs are met and their expectations are exceeded.

| Consultant | Year | Bill Week | Period | Dates | Date | Day | Hours | Customer | Project | Service Item | Notes |
|------------|------|-----------|--------|-------------------------|-----------|-----|-------|------------|--|---|---|
| Yohan Dole | 2021 | 7 | | 04/19/2021 - 04/24/2021 | 4/21/2021 | Wed | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | CAP Metro BOD meeting |
| Yohan Dole | 2021 | 7 | | 04/19/2021 - 04/24/2021 | 4/22/2021 | Wed | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | Troubleshooting PO BOD IsBates |
| Yohan Dole | 2021 | 7 | | 04/19/2021 - 04/24/2021 | 4/22/2021 | Wed | 1.50 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | 1 PO - 33335 not picking up Manula |
| Yohan Dole | 2021 | 7 | | 04/19/2021 - 04/24/2021 | 4/22/2021 | Thu | 0.50 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | 2 PO 33535 Line total amount is 7.7 |
| Yohan Dole | 2021 | 7 | | 04/19/2021 - 04/24/2021 | 4/23/2021 | Fri | 0.50 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | Ticket # 4003446 |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Mon | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | PO BOD Health Check Call |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Mon | 2.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | PO BOD Health Check Call |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Mon | 2.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | ClientName Meeting, CapMetro BOD |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Wed | 6.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | CapMetro PO Rec and PO Workflow |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/29/2021 | Thu | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | CapMetro Meeting, look into BOD's IsBates |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/29/2021 | Thu | 2.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | Arrend Meeting, look into BOD's IsBates |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/29/2021 | Fri | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | CapMetro BOD IsBates, Work Order |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/29/2021 | Fri | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | ClientName Consulting Service CS - Consulting | ClientName BOD IsBates, Take call |

| Total Hours Summary | | | | | | | |
|-------------------------------|--------------|-----------------|-----------------|--|--|--|--|
| Year | 2021 | | 1 | | | | |
| Bill Week | (All) | | 1 | | | | |
| Hours Summary | | | | | | | |
| Client Name | Sum of Hours | Hours Estimated | Hours Remaining | | | | |
| ClientName | 144.00 | | | | | | |
| Managed Services - ClientName | 96.00 | | | | | | |
| Consulting - Reports Project | 35.00 | 120.00 | 85.00 | | | | |
| Consulting - ABCXYZ Project | 13.00 | 100.00 | 85.00 | | | | |
| Grand Total | 144.00 | 220.00 | 130.00 | | | | |
| Current Week/Period | | | | | | | |
| Year | 2021 | | 1 | | | | |
| Bill Week | (All) | | 1 | | | | |
| Hours Summary | | | | | | | |
| Client Name | Sum of Hours | | | | | | |
| ClientName | 144.00 | | | | | | |
| Managed Services - ClientName | 96.00 | | | | | | |
| Consulting - Reports Project | 35.00 | | | | | | |
| Consulting - ABCXYZ Project | 13.00 | | | | | | |
| Grand Total | 144.00 | | | | | | |

Client Business Meetings

Weekly Business Meetings

Our Project Managers conduct weekly meetings with you to review Hours Reports, discuss ongoing projects, and address ticket statuses, business direction, and any issues or concerns. This regular interaction ensures customer satisfaction and helps manage budget concerns effectively. During these meetings, we thoroughly review hours consumption, discuss the status of issues and tickets, and provide updates on current projects or tasks. This comprehensive approach ensures that all aspects of the project are transparent and well-managed, fostering a collaborative and productive relationship.

Quarterly Leadership Meetings

At Cendien, we are dedicated to securing the best consultants for your projects. Our Managing Director and your Client Success Manager (CSM) will meet with you quarterly for leadership meetings. These sessions focus on:

- **Strategic and Business Direction Goals:** We engage in regular discussions to understand and align with your strategic objectives and business directions, ensuring our services are continually tuned to meet your evolving needs.
- **Feedback Solicitation:** These meetings provide a platform for you to offer candid feedback on our team and services. We value your insights and experiences, using them to foster improvements and excel in meeting your expectations. This feedback loop is crucial for nurturing a collaborative and productive relationship.


This collaborative approach ensures alignment with your goals and provides support that is both meaningful and beneficial. By prioritizing your satisfaction, we aim to build a strong, productive partnership.


Unique Support Model

We take immense pride in our unique operational model: “Engage One, Get Us ALL!” When you partner with a single expert from our team, you gain access to the collective expertise of all our seasoned professionals who stand behind them. Here’s how it works:

- **Comprehensive Expertise Access:** Our project managers have the freedom and authority to tap into the diverse skill set of our functional and technical consultants. This allows them to address tasks efficiently while adhering to a consistent flat rate.
- **Best-Fit Subject Matter Experts (SMEs):** For each Infor project, we assign the most suitable SMEs. If necessary, we assemble a SWAT team to tackle complex, urgent issues, ensuring your business needs are met and critical implementation projects move forward seamlessly.
- **Team-Centric Approach:** Our unwavering dedication to customer success drives our team-centric approach. We allocate the right resources, leveraging our extensive collective expertise to deliver optimal results.
- **Timely and Budget-Friendly Outcomes:** The results? Timely and budget-friendly outcomes, even within the intricate landscape of Infor solutions. Our team members are known for their profound product knowledge, effective communication, vast experience, and collaborative mindset when working with both customers and the Infor team.
- **Transparent Communication:** Throughout the project lifecycle, Cendien works closely with the City of Fort Lauderdale leadership, ensuring transparent communication about resource allocation and project expectations. This transparency helps in managing expectations and maintaining trust.
- **Proactive Issue Management:** Any potential issues or risks are promptly identified and addressed through additional resource allocation or necessary scope adjustments. This proactive approach ensures that projects stay on track and meet their objectives.


By leveraging this unique support model, Cendien ensures that your projects benefit from the collective knowledge and experience of our entire team, leading to successful and efficient project outcomes.





Engage One Get us All!

Team of over 50 Consultants



Roles and Responsibilities

Roles and responsibilities of the Cendien Team, designed to guarantee the success of your projects:

Role and Responsibilities

Client Director / Partner (Executive Leadership)

- **Accountability:** Holds overall responsibility for the delivery to the client.
- **Escalation:** Acts as the point of contact for resolving any client concerns about the delivery of consulting services.
- **SLA Review:** Reviews Support Level Agreements.
- **Internal Issues:** Ensures all internal issues are addressed at the appropriate levels.
- **Staffing Issues:** Manages all staffing issues raised by the Cendien project team.
- **Communication:** Serves as the primary source of communication to senior management.
- **Guidance:** Provides high-level guidance and direction for the project.
- **Quality Analysis:** Analyzes the quality of the project and the value-added services being provided.
- **Project Management:** Monitors project management from all parties to ensure commitment, quality, and clarity of expectations.
- **Escalation Point:** Acts as the escalation point for all project issues. Any issues that need to be escalated must first be communicated to the Project Manager.
- **Service Levels:** Gains a clear understanding of the client's existing service levels as reported through Key Performance reporting and works to ensure that these metrics can be maintained upon go-live.

Client Success Manager

- **Client Contact:** Acts as the primary contact for all client matters.
- **Escalation Assistance:** Provides primary assistance for the escalation of incidents, requests, problems, projects, and management services.
- **Service Requests:** Coordinates and tracks the prioritization of service requests.
- **Service Standards:** Ensures that client service standards and policies are adhered to.
- **Progress Review:** Reviews progress, hours, and status with the client.

Project Manager

- **Project Planning:** Works with the client's Project Manager to develop detailed project plans, schedules, and milestones.
- **Project Management:** Manages the project, maintaining equilibrium through the management of scope, cost, and schedule.
- **Communication:** Acts as Cendien's primary point of contact for all project communications.
- **Review:** Reviews consulting time bookings and invoicing activity for accuracy and completeness.
- **Best Practices:** Implements and executes project management best practices, as embodied in the Implementation Methodology.
- **Governance Model:** Develops and maintains the project governance model.
- **Project Plan:** Develops and maintains the project plan with the client.
- **Resource Planning:** Ensures the effective planning and availability of all Cendien resources.
- **Budget Management:** Manages and reports on the project budget.
- **Issue Identification:** Helps identify issues in a clear and concise manner.
- **Issue Resolution:** Facilitates the tracking, escalation, and resolution of issues.
- **Change Control:** Initiates and expedites change control procedures when required to validate out-of-scope requirements and address budget and timeline variations.
- **Issue Reporting:** Ensures that major project issues are identified to the appropriate levels of client and Cendien management.
- **Status Reporting:** Reports on project status and generates periodic evaluation reports.
- **Best Practices Implementation:** Ensures the implementation of a best practices-based business solution.
- **Meetings:** Participates in regular project status and steering committee meetings.
- **Service Levels:** Gains a clear understanding of the client's existing Service Levels as reported through Key Performance reporting and works to ensure that these metrics can be maintained upon Go-Live.

Consulting Services Team

- **Consulting Team:** The team provides consulting and/or managed support to the client.
- **Technical and Functional Support:** Offers technical and functional support for Infor applications and systems as requested.
- **Automation Support:** Provides support for transaction and process automation.
- **Task Support:** Provides support for the tasks requested by the client.

Functional Consultants

- **Business Conditions:** Directs and reviews the compilation of detailed business conditions that will detail requirements and form the foundation for functional testing and solution validation.
- **Configuration Guidance:** Provides expertise and guidance for configuration and database definition.
- **Business Requirements:** Participates in the identification of business requirements and the development of supporting business conditions.
- **Solution Design:** Provides application-focused expertise during solution design, including team training, application configuration and data definition, and security setup.
- **Product Education:** Provides standard product education for the core project team.
- **Process Modelling:** Guides the core teams in business process modelling and ensures the implementation of a best practices-based solution.

- **Testing and Validation:** Guides and supports activities during solution testing and validation.
- **Issue Resolution:** Identifies issues and provides solution alternatives for resolution. Validates, logs, and expedites resolution of product issues, ensuring that major project issues are identified to the appropriate levels of client and Cendien management.
- **Training Materials:** Assists with the development of end-user training materials.
- **User Acceptance Testing:** Provides support during user acceptance testing and 'go live'.
- **Reporting:** Provides formal, regular status and progress reporting to the Cendien Project Manager.

Functional Consultants

- **Technical Architecture Planning:** Assists in planning the technical architecture.
- **Administration Orientation:** Completes the initial orientation for application administration.
- **Data Conversion and Development Support:** Provides support for data conversion and program development.
- **System Administration:** Provides system administration and technical support.
- **Security and Administration Support:** Provides support for security and administration.

Developer Consultants

- **Customization and Integration:** Tailors and integrates Infor software solutions to meet the specific needs of the client organization, including modifying existing functionalities and integrating with other systems.
- **Code Development:** Writes code and scripts using relevant programming languages and tools to develop and enhance Infor applications, ensuring their effective and efficient operation.
- **Testing and Quality Assurance:** Takes responsibility for testing and quality assurance to identify and resolve bugs, errors, and performance issues within the software, ensuring a reliable and robust system.
- **Documentation:** Creates and maintains documentation for their development, including technical documentation, user guides, and training materials to help users understand and utilize the software effectively.
- **Infor Tools Assistance:** Assists in custom development, interfaces, and integrations using Infor tools including Infor BIRST, Infor ION, Infor OS, Infor IPA, Infor LN, Infor BODS, Infor Lawson 4GL and CASE, MS Add-Ins, Lawson Process Automation (IPA), Infor Landmark, Infor Lawson Business Intelligence (LBI), and Infor CloudSuite Architecture.
- **Reporting and Security:** Develops reports, builds dashboards, secures the applications, and ensures the environment is running smoothly.

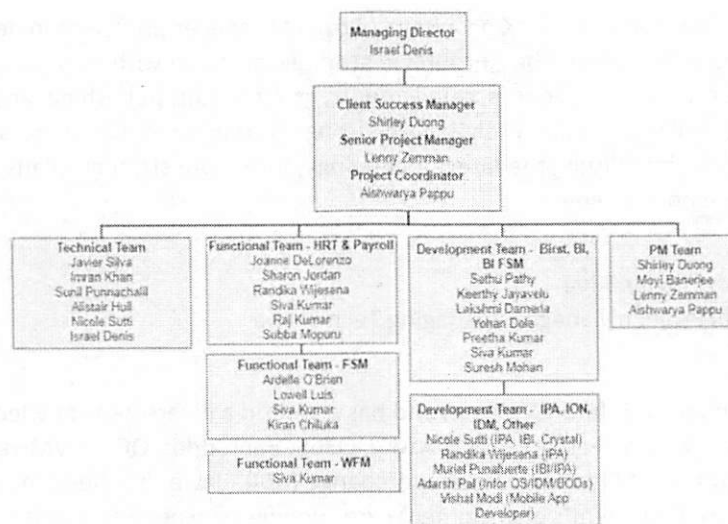
Assigned Personnel and Organization Chart

While you have several options for this engagement, Cendien stands out by delivering top-notch results with a high probability of success. Our expert team ensures quick issue resolution and integrates seamlessly with your team, providing dedicated support for your Infor CloudSuite application. We offer ongoing assistance for both support issues and essential projects, such as creating new reports, dashboards, interfaces, patches, migrations, and other changes.

Cendien is committed to providing exceptional Infor CloudSuite consulting support to the City of Fort Lauderdale, ensuring all engagements are successful and aligned with your strategic objectives. We look forward to a

productive partnership, working collaboratively towards success. With Cendien's support and management expertise, we will execute a detailed plan to ensure smooth operations for the Infor application.

If awarded, Cendien recommends the following team for Infor CloudSuite consulting services to support the City of Fort Lauderdale. This section provides a brief overview of each team member's skillset, with detailed resumes available in the attached "Cendien Partial Resume Book."



We have assembled a highly skilled team. This team comprises the following key resources from Cendien:

Management Team

Managing Director: Israel Denis

Responsibilities: Managing Director, Project Leadership and Oversight, Escalations

Professional Summary

Israel is a highly experienced Infor CloudSuite Certified Technical Consultant, specializing in Infor Financials, HR, and Procurement. With a comprehensive understanding of the Infor environment and web modules, he brings over 27 years of ERP experience to the table—25 years with Infor and 2 years with SAP, PeopleSoft, and Oracle. His extensive responsibilities include project management, scope analysis, process review, application support, resource planning, business realignment, system setup and testing, data conversions, and user training. Israel holds a master's degree from Georgia Tech and is known for his excellent written and verbal communication skills. Israel's deep expertise and broad skill set make him an invaluable asset to any project, ensuring efficient and effective solutions tailored to meet client needs.

Project Manager / Client Success Manager: Shirley Duong

Responsibilities: Project Manager, Scope Management, Client Liaison.

Professional Summary

Shirley is an excellently driven Project Manager and Application Consultant motivated by customer success. Proven to effectively triage projects in a timely manner. Keen eye for detail and disciplined approach to execution. Excels at driving projects to completion with top notch communication. She also has a proven track

record of ensuring system availability, performance, and security through proactive monitoring and risk mitigation strategies.

Senior Project Manager: Leonard Zemman

Responsibilities: Project Manager, Issue Resolution, Scope Management.

Professional Summary

Analytical and solution-focused Senior Infor Consultant / Project Manager proficient in design, administration, development, and analysis with a proven background in strategic planning within corporate finance, healthcare, human capital management, financial services, retail, media, government, publishing, and insurance industries. Recognized as a hands-on, brilliant problem solver with strong interpersonal skills who can rapidly resolve cross functional business problems by utilizing the latest technology, formulate strategic plans, and implement changes with benefit to the bottom line.

Technical Project Manager: Javier Silva

Responsibilities: Technical Project Manager, Managing Tech Scope

Professional Summary

Javier has been working in many different IT areas and has acquired a diversified knowledge of applications including Infor CloudSuite, Syteline, Factory Track, Azure, O365, BarTender, QCBD, VMware, Infor CloudSuite Industrial (CSI), and integration of Electronic Data Interchange (EDI). Javier has been managing the Infor technical team, making sure that client's environments are running as expected, monitoring, and troubleshooting Async and Work Unit errors, performing pre and post CU tasks.

Support Team

Finance and Supply Chain Management (FSM)

| Leads | Applications | Experience |
|--|--|---|
| Ardelle O'Brien SCM Lead | <ul style="list-style-type: none"> Infor Lawson SCM Certified | Ardelle has a successful track record in Supply Chain implementations: 12+ years experienced health services industry practitioner focused on serving clients within the firm's Enterprise Applications Solutions and Integration Practice. She worked on a variety of engagements delivering consulting services to include business requirements gathering, solution design, system testing, instruction, and implementation. She holds an Infor Certification in Supply Chain Management – Infor CloudSuite. |
| Lowell Luis FIN/SCM SME & Data Analytics | <ul style="list-style-type: none"> Infor Lawson FIN Infor Lawson SCM | Lowell possesses over 26 years of experience in Infor CloudSuite & Infor Lawson ERP, Business Performance Management, Finance, and Supply Chain Management. He has excellent verbal and written communication skills. Lowell is an analytical problem-solver, able to anticipate issues, and create methods that streamline operations and improve efficiency. He is skilled in building excellent rapport with clients and team members. |

| Leads | Applications | Experience |
|----------------------------|--|---|
| | | <p>Certified ScrumMaster – Braintrust Consulting Group</p> <p>Lean/Six Sigma Greenbelt – Lockheed-Martin Commercial Systems Engineering Certificate in Non-Profit Management</p> |
| Kiran Chiluka FIN SME | <ul style="list-style-type: none"> • Infor Lawson FIN | <p>Kiran is a highly motivated, results driven professional with 6+ years of work experience in Infor CloudSuite Financials. He has supported 30+ hospitals in Infor CloudSuite and Infor Lawson ERP Finance module</p> <ul style="list-style-type: none"> • Involved in design sessions, pre and post implementation which includes BPQ, prototype, testing, design documentation, writing scripts, conversions, go-live support • Expert in all finance related aspects – General Ledger, Accounts Payable, Matching, Cash Book, Asset Management and Taxes • Perform month - end closing process for Accounts payable, Cash Book, Asset Management and GL |
| Siva Kumar FIN/SCM Lead | <ul style="list-style-type: none"> • Infor Lawson FIN • Infor Lawson SCM | <p>Siva is a Passionate Leader and Infor Consultant with over 13+ years of experience in Implementation & Solutions Consulting of Infor Cloud Suite FSM Apps and Infor Lawson Finance and SCM.</p> <ul style="list-style-type: none"> • Experienced in Implementation & Solutions Consulting of Infor CloudSuite FSM (Financials and SCM) and Infor Lawson Finance/SCM modules. • Integration Architect with key responsibility in integrating Infor CSF and Infor Lawson with various Clinical systems and Retail systems. • Perform Gap Analysis of “As-Is” processes for different business functions & map “To-Be” process. • Business Process Re-Design and effective solutions mapping • Techno Functional expert handling legacy system data conversion & mapping different systems to Infor • Lead efficient and effective implementation of diverse company projects, while applying best business practices • Configure, train, and support the customer on the Infor Cloud Suite Application • Assist team in ensuring successful delivery of projects to customers in the agreed time frame |

Technical Team (includes System Admin, Security, and Developers):

| Leads | Applications / Tools | Experience |
|---------------------------------|---|--|
| Sethu Pathy Keerthy Jayavelu | <ul style="list-style-type: none"> • Infor Lawson Business Intelligence (LBI) • Infor Birst Certified • Infor BI FSM | <p>Sethu is Senior Infor d/EPM Expert with over 12 years of experience creating complex IBI and LBI reports. He is</p> |

| | | |
|---|---|--|
| Birst/Reporting Leads | <ul style="list-style-type: none"> • Infor d/EPM | certified in report and dashboard creation. He has experience with Financials, Supply Chain and HCM reports. |
| Other SMEs | | Keerthy also has extensive experience in Birst development and Leads the Birst Team. |
| Lakshmi Damerla Developer SME | <ul style="list-style-type: none"> • Infor Lawson Business Intelligence (LBI) • Infor Birst • Infor IPA Certified • MS Add Ins | Lakshmi is a senior Infor d/EPM and Birst Developer with over 20 years of experience developing complex reports. She is also a seasoned DBA and is extremely familiar with the inner workings of all the tables on the back end of Infor. She will be the primary lead on all development projects. |
| Nicole Sutti Developer SME | <ul style="list-style-type: none"> • Infor IPA • Landmark Config Console • Infor Lawson Business Intelligence (LBI) • Crystal Reports • MS Add Ins | Along with being a Techno Functional Consultant with over 20 years of experience on all modules, Nicole has extensive experience in development, testing, and training, and will assist the team with IPA, Config Console, 4GL, Crystal reports. |
| Adarsh Pal OS/IDM/ION Lead Lakshman Chowdry ION & BODs Lead | <ul style="list-style-type: none"> • Infor OS Portal • Infor ION/BOD • Infor Document Management (IDM) • Infor IPA • Landmark Config Console | Adarsh and Lakshman are very seasoned and experienced Infor ION and Infor BOD developers. They will be part of the team supporting Client to build custom interfaces. Adarsh additionally is an expert in Infor Document Management (IDM), which is an Infor document tool for those clients looking to replace MHC Software. |

System Administration, Security Administration, Release Management

| Leads | Applications / Tools | Experience |
|----------------------------|---|---|
| Imran Khan Tech Lead | <ul style="list-style-type: none"> • Infor Administration including LSF (Lawson Systems Foundation) • Infor Security Services (ISS) • CU Pre and Post Tasks • Replication • Async Monitoring | Imran is a senior Infor Technical consultant with over 14 years of experience doing installs, implementations, upgrades, migrations, and conversions. He will be the primary lead for all systems related items. Async and Queues are his specialty, and he will be responsible for technical validation of the system. |
| Alistair Hull Tech Lead | <ul style="list-style-type: none"> • Infor Administration including LSF (Lawson Systems Foundation) • Infor Security Services (ISS) • CU Pre and Post Tasks • Replication • Async Monitoring | Alistair is a results-driven and versatile customer-centric technical consultant with a wealth of Unix experience specializing in large-scale platform implementations utilizing expertise in Lawson's Technology suite of products. Possesses a bias for action and can thrive in a fast-paced, constantly changing work environment. Driven to define the vision, strategy, and roadmap to ensure customized solutions meet the customers' and stakeholders' expectations and needs. Exhibits a high level of thought leadership and masterful orchestration of people, processes, systems, and metrics to drive quality improvements across multiple industries. Operates with strong attention to detail to deliver thorough, meticulous, and highly actionable project plans. Demonstrated ability to manage cross-functional teams on |

| | | |
|-------------------------------|---|---|
| | | multiple projects with varying degrees of complexity and adaptable to shifting priorities. |
| Sunil Punnachalil Tech SME | <ul style="list-style-type: none"> • Infor Administration • Infor Security Services (ISS) • CU Pre and Post Tasks • Replication • Async Monitoring | An accomplished Information Technology professional and dynamic IT Leader with strong technical and analytical problem-solving skills with proven ability to simultaneously manage multiple high-complexity projects. Has more than 25 years of extensive expertise with Lawson ERP system implementation for various industries, including financial services, municipal government, educational institutions, non-profit, legal, retail etc. Significant depth with Infor's on premise, cloud, and hybrid architectures. Sunil has in-depth experience in installation, configuration, upgrades, security, and development. |
| Nicole Sutti Security Lead | <ul style="list-style-type: none"> • Infor Security Services (ISS) | Along with being a Techno Functional Consultant with over 20 years of experience, Nicole has extensive experience with Infor Security and administration. |

Release Management: Cendien will help in examining and testing the monthly Infor Critical Updates (CUs) during the post-production support period. Additionally, Cendien will train the client on the procedures for preparing and testing these monthly updates.

Project Management Team

| Leads | Applications / Tools | Experience |
|----------------------------------|--|---|
| Leonard Zemman Senior PM Lead | <ul style="list-style-type: none"> • Infor Lawson • Infor CloudSuite • Infor Birst • Infor Security • Infor Process Automation (IPA & LPA) • Infor Design Studio (ISD) • Microsoft Teams Collaboration • Microsoft SharePoint • Oracle • SQL | Lenny is an analytical and solution-focused Senior Infor Consultant / Project Manager proficient in design, administration, development, and analysis with a proven background in strategic planning within corporate finance, healthcare, human capital management, financial services, retail, media, government, publishing, and insurance industries. He is recognized as a hands-on, brilliant problem solver with strong interpersonal skills who can rapidly resolve cross-functional business problems by utilizing the latest technology, formulate strategic plans, and implement changes, with benefit to the bottom line. |
| Shirley Duong PM Lead | <ul style="list-style-type: none"> • Infor Lawson • Infor CloudSuite • Microsoft Teams Collaboration • Microsoft SharePoint • Monday.com PM Software • Asana PM Software • Azure • ServiceNow • FreshDesk • Amelia | Shirley is an excellently driven Project Manager and Application Consultant motivated by customer success. Proven to effectively triage projects in a timely manner. Keen eye for detail and disciplined approach to execution. Excels at driving projects to completion with top notch communication. She also has a proven track record of ensuring system availability, performance, and security through proactive monitoring and risk mitigation strategies. Strong interpersonal skills with the ability to communicate effectively with both technical and non-technical stakeholders. |
| Moyi Banerjee PM Lead | <ul style="list-style-type: none"> • Infor Lawson • Infor CloudSuite | Moyi is a Project Manager and Application Consultant motivated by customer success. She has proven to |

| | |
|---|---|
| <ul style="list-style-type: none"> • Microsoft Teams Collaboration • Microsoft SharePoint • Monday.com | effectively triage projects in a timely manner. Keen eye for detail and disciplined approach to execution. Excels at driving projects to completion with top notch communication. Moyi also has a proven track record of ensuring system availability, performance, and security through proactive monitoring and risk mitigation strategies. Strong interpersonal skills with the ability to communicate effectively with both technical and non-technical stakeholders. |
|---|---|

Qualifications and Certifications

We are committed to investing in our team, ensuring they receive the best training and certifications to provide unparalleled support. This dedication is evident in the quality of our services, our esteemed reputation, and our extensive qualifications and expertise. Our relentless pursuit of excellence guarantees that you receive top-tier support. Our consultants are not only dedicated to exceptional customer service but also bring a wealth of industry knowledge, enabling them to swiftly address both technical and functional challenges. They embody our mission and values, demonstrating boldness, integrity, and a commitment to client success. We go above and beyond to ensure your satisfaction and success.

Partial Matrix of Cendien Resources and Skillsets

| | Israel | Linda | Joanne | Sharon | Lowell | Iman | Nicole | Yohan | Silvia | Vijay | Greg | Alan | Ranajka | Adarsh | Lakshmi | Javier | Shirley | Austin | Tammy | Ror |
|---|--------|-------|--------|--------|--------|------|--------|-------|--------|-------|------|------|---------|--------|---------|--------|---------|--------|-------|-----|
| Expertise and Skills | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| Infor Technical System Admin | X | | | | | X | | X | X | X | | | | X | X | | | | X | |
| Infor Functional Expertise | | X | X | X | X | | | | | | X | X | X | | X | | | | | |
| Infor Birst / Infor Reports | | | | | | X | | X | | X | | | | X | X | | | | X | |
| Infor IDN / Landmark | X | | | | | X | X | X | X | X | | | | X | X | | | | X | |
| Infor Process Automation (IPA) | | | | | | X | | | | X | | | | X | X | | | | X | |
| Infor BODS | X | | | | | X | | | | X | | | | X | | | | | X | |
| Infor Security | X | | | | | X | X | X | X | X | | | | X | X | | | | X | |
| Infor Financials - AP, GL, RO, PO, etc. | | | | | X | | X | | X | | X | X | | | | | | | | |
| Infor GHR - HR, PR, BN, TA | | | X | X | X | | X | | X | | | | X | | | | | | | |
| Infor Development | | | | | | X | | X | | X | | | | X | X | | | | X | |
| Infor Project Management | | | X | | | | | | | | X | | X | | | | | | | |
| Infor Version Management | | X | X | X | X | | X | X | | | X | X | | | | | | | | |
| Infor Architecture and Solutions | X | X | | | | X | | X | X | | X | X | | X | X | | | | X | |
| Executive Management | X | X | X | | X | | | | X | | X | X | X | | | X | | | | |
| Infor Microsoft Integration | | | | | | | | | | | | | | | | X | X | X | | |
| Microsoft Support | | | | | | | | | | | | | | | | X | X | X | | |
| Client Support | X | X | | | | | | | | | | | | | | | X | X | X | X |
| Others as Needed | | | | | | | | | | | | | | | | | | | | |

| Resource | Skillset / Experience / Expertise |
|------------------|--|
| Joanne DeLorenzo | Infor Payroll & GHR / Infor Project Manager / Infor HR & Benefits Kronos Infor QA / ADP / Infor Testing / Infor Training |
| Sharon Jordan | Infor Payroll & GHR / Infor Project Manager / Infor HR & Benefits / ADP / Kronos / Infor QA Testing / Infor HR Functional |
| Lowell Luis | Infor CSM / Infor Financials / Infor SCM / Infor Accounts Payable / Infor Testing / Infor QA / Infor Solutions / Infor Architect / Infor IPA |



| | |
|-------------------|---|
| Selva Kumar | Infor GHR / Infor IPA / Infor CloudSuite / Infor LMS / Infor QA / Infor Testing / Infor Architect / Infor Solutions / Infor Management |
| Keerthy / Preetha | Infor IBI / Infor LBI / Infor EPM / Infor Architect / Infor Solutions / Infor QA / Infor Testing / Infor Data Analytics / Infor Data Marts |
| Randika Wijesena | Infor GHR / Infor CloudSuite / Infor Report Writer / Infor IPA / Infor QA Infor Testing / Infor Talent Management |
| Shirley Duong | Infor Project Manager / Infor Success Manager / Infor Management |
| Lakshmi Damerla | Infor Developer / Infor Report Writer / Infor QA / Infor Testing / Infor Technical / Infor Training / Infor IPA / Infor Lawson 4GL / MSCM / DBA |
| Nicole Sutti | Infor GHR / Infor LBI / Infor Report Writer / Infor SCM / Infor Financials Infor CloudSuite / Infor Training / Infor SCM / MSCM / Financials |
| Imran Zahid | Infor EAM / Infor LMS / Infor Technical / Infor CloudSuite / Infor IPA / Infor QA / Infor Testing / Infor Solutions / Infor Support / Infor DBA |
| Javier Silva | Infor Tech / Infor Support / Client Support / Microsoft System Support Technical Azure Expert / Cloud Solutions / Infor CSI / CloudSuite |
| Austin Hynes | Microsoft Support / Cloud Solutions / Client Support / Azure Support |
| Colby Criswell | Microsoft Support / Cloud Solutions / Client Support / Azure Support |
| Flor Razeto | Client Support / Office Admin / Consultant Support |

Section 4 – Client References

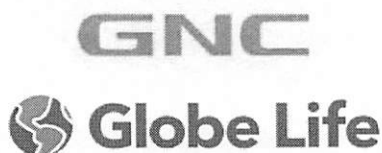
Provide at least three references, preferably government agencies, for projects with similar scope as listed in this RFP. Information should include:

- Client Name, address, contact person telephone and E-mail addresses.
- Description of work.
- Year the project was completed.
- Total cost of the project, estimated and actual.


Cendien offers a professional Consulting Services support model to other government entities such as the Northeast ISD, City of Guilford, and County of Cuyahoga. Our expertise also extends to the private sector, with clients including Globe Life, GNC, MV Transportation, Bon Secours Hospital, Cooper Health, Children's Health, and Nurse Assist. To facilitate reference checks, we kindly request that you initiate an email to coordinate with these clients before making a call, ensuring a suitable time can be scheduled in advance.

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|-------------------------------------|----------------------------|--------------------------------|
| • GNC | • e4 Services | • Boy Scouts of America |
| • RTA (Regional Transit Authority) | • Cinemark USA | • University Health |
| • City of Concord | • CVS Health | • Parkdale Mills |
| • Santa Clara Valley Water District | • Arvest Bank | • Arabian Centers |
| • Globe Life (formerly Torchmark) | • UrbanOne | • Froedtert Health |
| • NEISD (North East ISD) | • RadioOne | • McKinsey & Co |
| • Bon Secours Hospital | • Eastern Maine Healthcare | • City of Carrollton, TX |
| • Westchester Medical System | • Olathe Medical Center | • City of Arlington, TX |
| • Cooper Health | • Sheridan Healthcare | • Tift Regional Medical Center |
| • Devry University | • Novant Health | • Workers Compensation Board |
| • Cooks Childrens | • MV Transportation | |
| • Rochester Medical | • JFK Medical Center | |
| • Dallas Area Rapid Transit (DART) | • Golden Gate Capital | |


Our clients are happy to provide testimonials of our excellent services.




Reference 1: Infor Consulting and Managed Services to Regional Transit Authority (RTA)

| | |
|---|---|
| Project Description  | <p>The Regional Transit Authority has partnered with Cendien for comprehensive management and support of their Infor Applications. This collaboration involves the implementation of an ERP Roadmap aimed at enhancing functionalities, resolving issues, improving reporting mechanisms, and ultimately, achieving user satisfaction.</p> |
| Project Goal/Objective | <p>We offer both functional and technical expertise for resolving issues, improving business processes, setting up systems, making configuration changes, understanding user requirements, designing reports, handling enhancement requests, and making system changes. We also implemented Infor Document Management (IDM) and customized reports in BI FSM / Application Studio.</p> |
| Support Services | <ul style="list-style-type: none"> • Functional Support of Infor CloudSuite Applications (FIN and SCM) • ERP Improvements & Pain Points • Technical and Functional Staffing Support • Infor Document Management implementation • BI FSM Reports Development and Enhancements |
| Dates of Engagement | 2021 to present, 2 years + of providing service |
| Project Owners | Asanka DeSilva, Moyi Banerjee |
| Team Members | Sethu Pathy, Siva Kumar, Sharon Jordan, Nicole Sutti, Moyi Banerjee, Imran Khan, Javier Silva, Randika Wijesena, Joanne DeLorenzo, Muriel Penafuerte, Lakshmi Damerla |
| Contact | <p>Asha Mathunny IT Director, Applications Services Phone: (312) 913-3200 asha.mathunny@rtachicago.org</p> |
| Contract Amount | \$1.8M (ERP Staffing, ERP Consulting) |
| Contract Duration | 5+ years (Status: Ongoing) |
| Completion Date | 12/31/2026 |
| Client Statement | <p>"The RTA worked with Cendien since June 2021 with Infor related maintenance support and projects to help us with the many challenges that come with working an ERP system. The Cendien team has provided us with the right resources, having the necessary technical expertise and knowledge to deliver on critical projects to our different departments. We look forward to our continued partnership." ~Asha Mathunny 12/4/2023</p> |

Reference 2: Infor Consulting and Managed Services to Santa Clara Valley Water District

| | |
|---|---|
| Project Description  | <p>Santa Clara Valley Water District enlisted Cendien's help for the development of various reports that Infor was unable to create or deliver in a timely manner. Cendien successfully developed these reports using Birst, IPA, and ISD (Infor Spreadsheet Designer). Additionally, Valley Water engaged Cendien's Managed Services for the deployment of its Infor CloudSuite applications, specifically for FSM (FIN and SCM) and HCM applications.</p> |
| Project Goal/Objective | <p>Cendien developed reports using Birst, IPA, and ISD, and demonstrated them to users. Within a span of a month, Cendien was able to expedite the development of these reports. Valley Water also issued a Request for Proposal (RFP) for Managed Services, for which Cendien secured a multi-year contract. This contract involves providing ongoing support for the rollout of Infor CloudSuite to Valley Water's team. Cendien is actively optimizing business processes and assisting the business in bridging City of Fort Lauderdale through configurations and solutions. The team is consistently reviewing processes to ensure a comprehensive implementation of Infor solutions.</p> |
| Support Services | <ul style="list-style-type: none"> • Reports Development and System Enhancements • Functional Support of FIN, SCM, and HCM applications • Custom IPA Report Development and US Bank Integration Project • Systems Integrations for: Hyland OnBase, ProjectMate, Water Efficient • Infor Document Management (IDM) for PO's (Purchase Orders) • Absence Management Configuration and Setup for Temps/Interns • ION BODs/ION API/IPA Development |
| Dates of Engagement | <p>2021 to present, 2 years + of providing service</p> |
| Project Owners | <p>Linda VanTran Gebbia, Leonard Zemman</p> |
| Team Members | <p>Joanne DeLorenzo, Keerthy Jayavelu, Nicole Sutti, Moyi Banerjee, Imran Khan, Javier Silva, Shirley Duong, Randika Wijesena, Muriel Penafuerte, Lakshmi Damerla, Siva Kumar, Muriel Penafuerte, Lakshmi Damerla</p> |
| Contact | <p>Linda Huang Corporate Applications Manager - Software Services Phone: (408) 630-2459 LHuang@valleywater.org</p> |
| Contract Amount | <p>\$400,000 (ERP Staffing, ERP Consulting)</p> |
| Contract Duration | <p>5+ years (Status: Ongoing)</p> |
| Completion Date | <p>12/31/2026</p> |
| Client Statement | <p>"Cendien has been providing managed services to Valley Water for about 2 years. The overall experience is very good. Cendien management is responsive and stays on top of projects. We have regular meetings with Cendien consultants, project managers, and executive teams to discuss project progress and strategy. Cendien has delivered vendor interfaces, IPA programs, custom workflows, and student/temp program." ~ Linda Huang 12/4/2023</p> |

Reference 3: Infor Consulting and Managed Services to City of Concord

| | |
|--|--|
| <p>Project Description</p>  | <p>City of Concord could not properly support their Infor Lawson ERP Applications due to limited staff. They needed help with project management, ongoing support, overall strategy, applying patches, upgrades, improving system performance, LBI and 4GL development, Year End closing process, supporting interfaces, and technical/functional expertise to better manage their Infor applications. Additionally, City of Concord needed assistance with their Window servers. This includes database management, updating patches on Windows servers, rebuilding replication, automating processes, and working with their Infrastructure team.</p> |
| Project Goal/Objective | Provide both functional & technical expertise for issues resolution, business process improvement, system setup, configuration changes, user requirements, report design, enhancement requests, and system changes. Cendien was able to quickly integrate to COC and become an extension of their support team. |
| Support Services | <ul style="list-style-type: none"> • Windows Server Upgrade Project / Windows Server Patching • User Training / Data Optimization • Functional Support of FIN, SCM, and HCM • Lawson Payroll/HR, including Year End Support and Patching • Infor Security Administration / LBI Reports, and Crystal Reports Development • Infor ADFS/LDCity of Fort Lauderdale Project / Infor OS Environment Installs • Lawson Env Upgrade (LSF, Java, WebSphere, Portal) • BSI TaxFactory Upgrade • Custom 4GL Program Development |
| Dates of Engagement | 2021 to present, 2 years + of providing service |
| Project Owners | Linda VanTran Gebbia, Shirley Duong |
| Team Members | Austin Hynes, Luis Acevedo, Nicole Sutti, Lakshmi Damerla, Dave Alwardt, Javier Silva, Joanne DeLorenzo, Imran Khan, Lowell Luis, Sharon Jordan |
| Contact | <p>Damaris Sambajon IT Manager, Enterprise Applications Phone: (510) 207-9737 damaris.sambajon@cityofconcord.org</p> |
| Contract Amount | \$450,000 (ERP Staffing, ERP Consulting, ERP Managed Services) |
| Contract Duration | 5+ years (Status: Ongoing) |
| Completion Date | 12/31/2026 |
| Client Statement | <p>"Cendien are one of the most professional, responsive vendors I have worked with – and I have worked with many. They have a dedicated team that are knowledgeable and responsive. I can't say enough – they are a team, and you become a member with them towards the success of your organization. I highly recommend their services. Please feel free to contact me at any time. You can reach me on my personal cell – 510-207-9737." ~Damaris Sambajon 12/3/2023</p> |

Section 5 – Cost Proposal

Cendien's Managed Services Offering for the City of Fort Lauderdale

Cendien's Infor Managed Service is designed to be flexible, predictable, and scalable, enabling the City of Fort Lauderdale to maintain predictable monthly budgets while allowing for scalability as needed. Our managed service is billed on a 4-week period basis. If there is an overage in any given period, those hours will be billed at the overage hourly rate.

Cendien Infor Managed Services Offering:

The City commits to paying a service fee for hours used within each 4-week period, with a commitment of twenty-four (24) months. These hours will grant the City access to Cendien's team of Infor consultants for all work covered under the RFP. Hours not used within one period do not carry over to the next period. If the period hours are exceeded, the City agrees to pay for the overage as a professional services fee at the rates provided below.

Infor Managed Services – Fully Remote

| Service Description | Base Hours | Hourly Rate | Yearly Budget |
|--|------------|--------------|---------------|
| Infor Managed Services 25 hours per week | 1300 | \$150 / hour | \$195,000 |
| Infor Managed Services 30 hours per week | 1560 | \$145 / hour | \$226,200 |
| Infor Managed Services 33 hours per week | 1716 | \$140 / hour | \$240,240 |
| Infor Managed Services 35 hours per week | 1820 | \$140 / hour | \$254,800 |
| Infor Managed Services 40 hours per week | 2080 | \$135 / hour | \$280,800 |
| Infor Managed Services 80 hours per week | 4160 | \$130 / hour | \$540,800 |

Infor Absence Managed Post-Go-Live Audit

Cendien plans to conduct the Post-Go-Live Audit Special Project completely remotely. We recommend running it through our Managed Service to secure a more favorable rate for the services. By doing so, you can allocate a larger bucket of yearly hours, resulting in a better overall rate for the entire project.

We estimate this project to require around 250 hours. If treated as a lump sum, the overall rate would be higher. Utilizing our Managed Service will help you manage costs more effectively, and you will likely have other special projects that can be included in the Managed Service.

| Service Description | Hours | Rate | Estimate |
|---|-------|--------------|----------|
| Infor Absence Management Post-Go-Live Audit | 250 | \$165 / hour | \$41,250 |

Managed Services Structure

| Item | Description |
|------------------------------------|---|
| Service Term | 24 months (24x7x365) – exception certain holidays |
| Service Hours | Monday – Friday (8:00am – 6:00pm) |
| After Hours | Monday – Friday (6:01pm – 7:59am) / Weekends & Holidays |
| Managed Services Program Structure | Program block of hours per week for support. Infor Managed Services and Support Functional, Technical, System Admin and Development User Support. The overage rate is at the same rate. |
| 24x7 Service Desk | Client can submit tickets through a 24/7/365 service desk which will be assigned to the Infor AMS Team with a response SLA - Phone, Email, Chat and Self-Service Ticketing |
| Onsite Travel | Onsite travel expenses will be incurred for consultants and must be approved by the client prior to scheduling. |

Managed Service Delivery

- **Fully Remote:** All managed services are provided remotely.
- **Onsite Support:** If onsite presence is preferred or requested, the City will incur all travel expenses for our consultants.

Rate Adjustment Terms

The service rate will remain unchanged for the first two years of the agreement. Starting in the third year, the rate will increase annually by 5% for both the third and fourth years. This rate adjustment ensures predictable costs while accommodating for inflation and the continued high-quality support provided by Cendien.

Terms and Conditions

- **Period Minimum Hours:** Hours do not roll over from period to period. However, if Cendien is unable to provide the requested support, one period carryover of unused hours will be approved.
- **Project Management:** Only one project manager will have billable hours for servicing the account. A resource coordinator will be assigned to manage tickets, resources, and provide updates. The resource coordinator is not considered a project manager.
- **Application Monitoring:** Monitoring will not be billed for more than one hour per day. If issues arise, they will be treated separately, and tickets should be opened. This is limited to Async Queues, Security BODs, and Process Server.
- **Contract Period:** A period is defined as 4 weeks, resulting in thirteen (13) periods per year. Minimum period hours must be used within each 4-week period. Hours do not roll over from period to period.
- **Client Onboarding:** Onboarding will be waived for the City of Fort Lauderdale and will be limited to 40 hours.

Travel Expenses

Cendien will provide services to the City of Fort Lauderdale completely remotely. However, if onsite support is preferred or requested, the City will reimburse Cendien for all travel-related expenses, including airfare, hotel, and car rental. These expenses must be pre-approved in writing by the City.

- **Airfare:** Calculated at the most economical coach rate.
- **Car Rental:** Limited to economy size vehicles.
- **Hotel Stay:** Limited to moderate standard room rates.

Cendien will use commercially reasonable efforts to minimize expenses, and all travel arrangements will be made through the City's Travel Department in accordance with the City's travel policy. Cendien will provide copies of receipts for all travel expenses. The applicable per diem rate for this project is \$50, with no markup on expenses.

Section 6 – Minority and Women Participation

If your firm is a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act of 1985, provide copies of your certification(s). If your firm is not a certified M/WBE, describe your company's previous efforts, as well as planned efforts in meeting M/WBE procurement goals under Florida Statutes 287.09451.

Cendien is proud to be certified as a Minority Business Enterprise (MBE) by the North Central Texas Regional Certification Agency (NCTRCA). This prestigious certification highlights our unwavering commitment to diversity and inclusion, showcasing our dedication to cultivating a diverse workforce and promoting fair business practices. The NCTRCA's recognition is a testament to our continuous efforts to make a positive impact on the community and the broader business landscape.

Section 7 – Subcontractors

Proposer must clearly identify any subcontractors that may be utilized during the term of this contract.

We do not plan on using any subcontractors during the term of this contract.

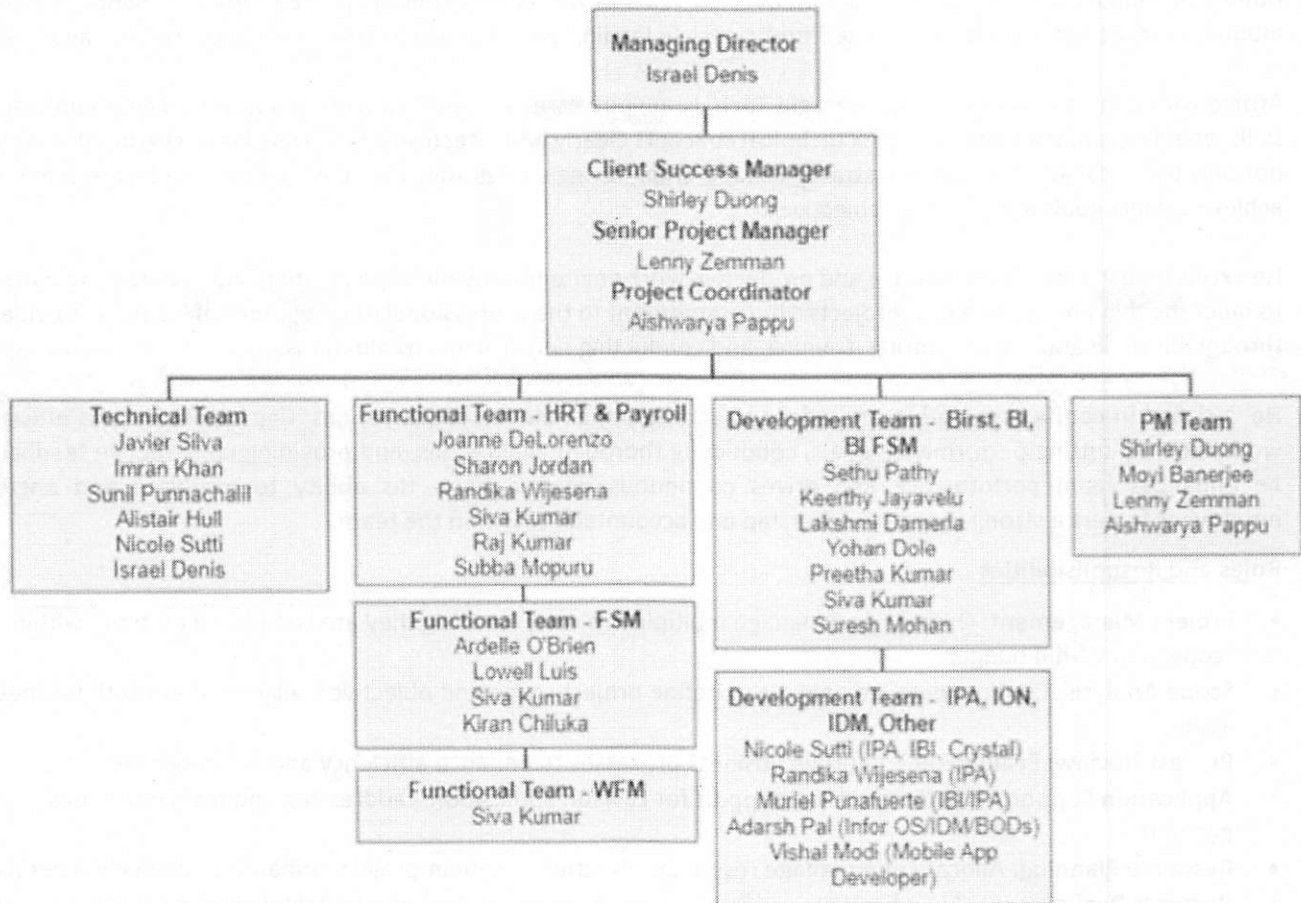


Section 8 – Required Forms (Attachments)



Delivery Partner

Cendien Partial Resume Book



Professional Summary

A highly accomplished Senior Practice Director with a wealth of expertise in ERP Systems, specializing in Financials, Human Resources, and Procurement. With over 18 years of hands-on experience in ERP environments and web modules, professional has demonstrated proficiency in leading systems such as Oracle, PeopleSoft, SAP, and Infor.

Armed with a master's degree from Georgia Tech, Israel possesses exceptional written and verbal communication skills, enabling him to convey complex technical concepts clearly and effectively. His extensive background includes not only technical acumen but also strategic leadership, having successfully managed and directed large teams to achieve project goals and business objectives.

He excels in fostering a collaborative and productive work environment, adeptly allocating and managing resources to meet the dynamic demands of projects. His commitment to the professional development of his team is evident through his dedication to mentoring, training, and conducting performance evaluations.

He is skilled in conflict resolution and adept at addressing employee concerns, ensuring a positive and efficient workplace. By setting performance goals, conducting thorough evaluations, and providing constructive feedback, he enhances team performance and drives continuous improvement. His ability to motivate and engage employees fosters a strong sense of ownership and accountability within the team.

Roles and Responsibilities

- **Project Management:** Oversee and manage multiple projects, ensuring they are completed on time, within scope, and within budget.
- **Scope Analysis:** Conduct detailed analysis to define project scope and objectives, aligning them with business goals.
- **Process Review:** Evaluate and improve business processes to enhance efficiency and effectiveness.
- **Application Support:** Provide technical support for Lawson applications, addressing and resolving issues promptly.
- **Resource Planning:** Allocate and manage resources effectively to meet project demands and business needs.
- **Business Realignment:** Align business operations with strategic goals through careful planning and execution.
- **System Setup and Testing:** Configure and test systems to ensure they meet business requirements and function correctly.
- **Data Conversions:** Manage data migration and conversion processes to ensure data integrity and accuracy.
- **User Training:** Develop and deliver training programs to ensure users are proficient with Lawson applications.
- **Team Management:** Lead and manage a team of over 15 consultants, fostering a collaborative and productive work environment.

Technical Expertise

- **Technical Certifications:** ERP Portal/Web products, Microsoft Database Administrator, Oracle Database Administrator, Unix, Linux, Windows Administrator, Security Expert, Database Expert, Application Installer, ERP Upgrade Consultant.

- **ERP Software:** Extensive knowledge of Lawson table structure, performed upgrades and installations on UNIX and Windows, conducted cyclical upgrades and patch installations.
- **Interfaces:** Installed and tested interfaces (ACH, FRICK, TALX, KPI).
- **Reporting:** Created end-user reports using Crystal Reports, Enterprise Reports, Scorecard, Birst, CloudSuite Analytics and Enterprise Reporting Suite.
- **Specifications:** Developed detailed specifications for program development.
- **Data Mapping:** Involved in data mapping for over 60 interface files.
- **Automation:** Developed scripts to automate routine tasks.

Management Skills

- **Leadership:** Proven leader with the vision and experience to successfully implement any technical project, ensuring alignment with organizational goals and objectives.
- **Cross-Project Communication and Coordination:** Extensive experience in managing communications, coordination, and resource management across multiple projects, ensuring seamless integration and collaboration.
- **Self-Starter:** Highly motivated individual with the ability to work independently and influence team members positively, fostering a collaborative and productive work environment.
- **Cost Savings Analysis:** Skilled in evaluating and determining cost savings across a portfolio of products and services, optimizing financial performance and resource allocation.
- **Policy Development and Maintenance:** Developed and maintained comprehensive policies and procedures to enhance and protect the integrity, security, and efficient use of the Lawson system, ensuring compliance and operational excellence.
- **Analytical and Problem-Solving Skills:** Exceptional analytical and problem-solving abilities, adept at identifying issues, developing solutions, and implementing effective strategies.
- **Results-Oriented:** Highly motivated and results-driven, consistently achieving and exceeding project goals and performance targets.

Highlighted Clients as Director

Santa Clara Valley Water District Senior Practice Director

01/2013 - Present

- **Strategic Leadership:** Directed the strategic planning and execution of multiple high-impact projects, aligning them with Valley Water's mission and goals.
- **Team Management:** Led a diverse team of professionals, fostering a collaborative and high-performance work environment.
- **Project Oversight:** Oversaw the successful completion of numerous projects, ensuring they were delivered on time, within budget, and met quality standards.
- **Stakeholder Engagement:** Engaged with key stakeholders, including clients, vendors, and internal teams, to ensure alignment and satisfaction.
- **Process Improvement:** Implemented process improvements that enhanced operational efficiency and effectiveness, leading to significant cost savings and productivity gains.

- **Risk Management:** Identified and mitigated risks associated with project delivery, ensuring minimal disruption and maintaining project integrity.
- **Budget Management:** Managed project budgets, ensuring optimal allocation of resources and adherence to financial constraints.
- **Performance Metrics:** Developed and monitored performance metrics to track project progress and outcomes, ensuring continuous improvement.
- **Innovation:** Promoted a culture of innovation, encouraging team members to explore new ideas and technologies to drive project success.
- **Compliance and Governance:** Ensured all projects adhered to regulatory requirements and organizational policies, maintaining high standards of compliance and governance.

City of Concord

01/2018 - Current

Senior Practice Director

- **Strategic Leadership:** Spearheaded the strategic planning and execution of multiple high-impact projects, ensuring alignment with the City of Concord's mission and long-term objectives.
- **Team Management:** Directed a diverse team of professionals, fostering a collaborative, inclusive, and high-performance work environment that encouraged innovation and excellence.
- **Project Oversight:** Successfully managed the completion of numerous projects, ensuring they were delivered on time, within budget, and met or exceeded quality standards.
- **Stakeholder Engagement:** Actively engaged with key stakeholders, including city officials, community leaders, vendors, and internal teams, to ensure alignment, transparency, and satisfaction.
- **Process Improvement:** Implemented and refined processes to enhance operational efficiency and effectiveness, resulting in significant cost savings and productivity improvements.
- **Risk Management:** Identified, assessed, and mitigated risks associated with project delivery, ensuring minimal disruption and maintaining project integrity.
- **Budget Management:** Oversaw project budgets, ensuring optimal allocation of resources, adherence to financial constraints, and maximization of value.
- **Performance Metrics:** Developed, monitored, and reported on performance metrics to track project progress and outcomes, driving continuous improvement and accountability.
- **Innovation:** Cultivated a culture of innovation, encouraging team members to explore new ideas, technologies, and methodologies to drive project success and enhance service delivery.
- **Compliance and Governance:** Ensured all projects adhered to regulatory requirements, city policies, and best practices, maintaining high standards of compliance, governance, and ethical conduct.

Globe Life Insurance

01/2018 - Current

Senior Practice Director

- **Strategic Leadership:** Directed the strategic planning and execution of multiple high-impact projects, ensuring alignment with Globe Life Insurance's mission and long-term objectives.
- **Project Oversight:** Successfully managed the completion of numerous projects, ensuring they were delivered on time, within budget, and met or exceeded quality standards.

- **Team Management:** Led a diverse team of professionals, fostering a collaborative, inclusive, and high-performance work environment that encouraged innovation and excellence.
- **Stakeholder Engagement:** Actively engaged with key stakeholders, including company executives, clients, vendors, and internal teams, to ensure alignment, transparency, and satisfaction.
- **Budget Management:** Oversaw project budgets, ensuring optimal allocation of resources, adherence to financial constraints, and maximization of value.
- **Process Improvement:** Implemented and refined processes to enhance operational efficiency and effectiveness, resulting in significant cost savings and productivity improvements.
- **Risk Management:** Identified, assessed, and mitigated risks associated with project delivery, ensuring minimal disruption and maintaining project integrity.
- **Performance Metrics:** Developed, monitored, and reported on performance metrics to track project progress and outcomes, driving continuous improvement and accountability.
- **Compliance and Governance:** Ensured all projects adhered to regulatory requirements, company policies, and best practices, maintaining high standards of compliance, governance, and ethical conduct.
- **Innovation:** Cultivated a culture of innovation, encouraging team members to explore new ideas, technologies, and methodologies to drive project success and enhance service delivery.

Highlighted Technical Experiences

MV Transit

01/2019 - Current

Senior ERP Technical Consultant

- Assisted in project management and support resolution for various issues
- Applied Patches and Certificates to all Infor/Lawson environments
- Managed project and coordinated efforts with Infor Cloud Support Team

Startek

10/2020 - Current

Senior ERP Technical Consultant

- LDAP to LDAPS Migration and Support of Technical Issues
- Applying environment and application patches

Guilford County

01/2017 - Current

Senior ERP Technical Consultant

- Assisted in project management and support resolution for various issues

UH Systems

01/2017 - Current

Senior Infor Lawson Security Consultant/Expert

- Perform system support and assisted with migration project
- Upgraded Landmark / LSF and various components from the environments / apps
- Created new IPA to monitor system and performed ISS Sync
- Fixed all issues with the process servers

General Nutrition Centers

04/2018 – Current

Senior Infor Lawson Consultant/Project Manager

- Assisted with the Upgrade to Landmark, LSF and Mingle
- Applied Patches and Certificates to all Infor/Lawson environments
- Managed project and coordinated efforts with Infor Cloud Support Team

Arabian Centers

04/2018 – 06/2018

Senior Infor Lawson Security Consultant/Expert

- Created new security roles / security classes for the Dubai client
- Trained client in new security models and ensured their systems didn't have issues
- Perform ISS sync and fixed all issues with user BODs.

Radio One

10/2017 – 12/2017

Senior Infor Lawson Security Consultant/Expert

- Mass loaded users into both Landmark and LSF
- Setup multiple security classes & roles for finance, human resources and supply chain
- Migrated all the user's jobs from on premise environment to a CloudSuite system

Tift Regional Medical Center

06/2017 – 07/2017

Senior Infor Lawson Security Consultant/Expert

- Mass loaded users into both Landmark and LSF
- Setup multiple security classes & roles for finance and human resources
- Conducted security training to hospital administrators
- Assisted in system maintenance and ensure job migrations
- Setup and the ADFS system for Tift Regional on the cloud

Golden Gate Capital

03/2017 – 09/2017

Senior Infor Lawson Security Consultant/Expert

- Help trouble issues with security with the client after go-live
- Created custom rules to help secure Infor CloudSuite financials

Kerry

07/2017 – 08/2017

Senior Infor Lawson Security Expert

- Help trouble issues with security with the client after go-live
- Created custom rules to help secure Infor Lawson system

Olathe Health

04/2017 – 08/2017

Senior Infor Lawson Security Consultant/Expert

- Mass loaded users into both Landmark and LSF
- Setup multiple security classes & roles for finance and human resources
- Conducted security training to hospital administrators
- Assisted in system maintenance and ensure job migrations
- Setup and the ADFS system for Olathe on the cloud

Scottish Rite

01/2017 – 09/2017

Senior Infor Lawson Technical Consultant / InforBI Reporting Architect

- Install and configure Infor BI Analytics
- Implement Healthcare Analytics - Version 10.0.1.4
- Setup ETL jobs for Infor BI Analytics
- Configure and setup standard Infor BI Analytics OLAP cubes and reports
- Design and develop reports for following Areas using Application Studio
- Created multiple reports for the business administration department
- Setup reporting security for all business reports and tested most reports
- Conducted meetings to gather report specs and generate design requirements
- Financial Management (General Ledger Cube, Payables Cube, Strategic Management Cube)

ARVEST Bank

02/2017 - 09/2017

Senior Infor Lawson Technical Consultant - PROD Migration / Upgrade

- Upgraded Arvest PRODUCTION Environment
- Apply patches and help resolved issues for the Lawson / Infor applications
- Migrated Lawson applications and Landmark env from Unix to Windows
- Migrated their database from DB2 to SQL Server

Baptist Memorial Healthcare Corp

08/2016 - 02/2017

Senior Infor Lawson Upgrade Consultant - -- V10 Upgrade Expert

- Installed and migrated Baptist LBI, LSF and Landmark version 10 environments
- Created multiple LBI and Crystal Reports and setup report distribution for the teams
- Coordinated all efforts to resolve all issues for the LSF environment upgrade
- Helped resolved Ming.le timeout issues and apply critical patches to the environment
- Upgraded ERS, EFS, LSN and all their LBI data (even while going to different servers)
- Ensure LBI was working correctly - including all reports, schedules and smart notes
- Apply BSI patches and upgraded BSI to the latest cyclical

CVS Health

11/2015 - 07/2016

Senior Lawson Technical Consultant – Ongoing Support / Migration

- Helped support issues from the previous migrations
- Provided Lawson LSF Application and Environment Support
- Assisted and help coordinate migration to new data center
- Assisted all functional users resolve all issues and ensured a successful upgrade
- Apply patches and help resolved issues for the Lawson / Infor applications
- Help develop/create new LSF environment in the CVS Datacenter
- Implement distributed job processing

ARVEST Bank

11/2015 - 12/2016

Senior Lawson Technical Consultant – Migration / Upgrade

- Installed and upgraded Arvest LSF Application and Landmark Environment
- Apply patches and help resolved issues for the Lawson / Infor applications
- Migrated Lawson applications and Landmark env from Unix to Windows

- Migrated their database from DB2 to SQL Server

City of Arlington, TX

07/2015 - 10/2015

Senior Lawson Technical Consultant / Migration Expert

- Assisted with platform migration from Unix to Windows
- Setup and configured Strategic Sourcing and Contract Management
- Migrated data from various environments and help troubleshoot issues

Allen Systems Group

05/2015 - 07/2015

Senior Lawson Technical Consultant – LSA Security Expert

- Setup Lawson version 10 security roles and classes
- Help troubleshoot issues with LSF security during user acceptance testing
- Resolved a number of security issues

McKinsey

04/2015 - 05/2015

Senior Lawson Technical Consultant – LSA Security Expert

- Created complex LSF security roles and classes for their GO-LIVE
- Complex security classes using PROCESS-LEVEL and SEC-LEVEL
- Help troubleshoot issues with LSF security during UAT (user acceptance testing)

CVS Health

03/2014 - 05/2015

Senior Lawson Technical Consultant – Ongoing Support / Migration

- Provided Lawson LSF Application and Environment Support
- Assisted and help coordinate migration to new data center
- Assisted all functional users resolve all issues and ensured a successful upgrade
- Apply patches and help resolved issues for the Lawson / Infor applications
- Help develop/create new LSF environment in the CVS Datacenter
- Implement distributed job processing
- Converted from LAUA to LSF Security

Froedtert Health

05/2013 - 02/2014

Senior Lawson Technical Consultant – LSF Upgrade / Migration

- Assisted with migration of Lawson LSF Application and Environment (Velocity to Infor)
- Assisted with the upgrade of Lawson Environment and conversion from Unix to Windows
- Migrated users, forms, jobs, scripts, database schemas as a Lawson Administrator
- Rolled out Lawson single sign-on features across the Hospital using Active Directory
- Developed all requirements for single sign-on and user mapping from Unix to Windows
- Assisted with setup and initial roll out of GHR (Global Human Resources)
- Mapped users across GHR and LSF environments for the HR and the hospital
- Assisted all functional users resolve all issues and ensured a successful upgrade
- Apply patches and help resolved issues for the Lawson/Infor applications

Management Skills

- Leader with background and vision to implement any technical project
- Experience in cross-project communications, coordination and resources management
- Self-starter with ability to work well with and influence others
- Ability to determine cost savings against a portfolio of products and services
- Developed and maintained policies and procedures to enhance and protect the integrity, security and efficient use of the Lawson system
- Excellent analytical and problem-solving skills
- Results oriented and highly motivated

Other Skills

- **Microsoft SQL Server:** Proficient in using Microsoft SQL Server for the development of robust applications and information systems. Experienced in full lifecycle database development, including both logical and physical design modeling.
- **Database Development:** Extensive experience in developing complex queries and stored procedures, with a strong emphasis on performance tuning using T-SQL.
- **ETL Processes:** Skilled in using Data Transformation Services (DTS) for the development of ETL processes, effectively linking to external data sources via ODBC and OLE DB.
- **Data Integration:** Expertise in integrating Data Marts to consolidate and streamline data from various sources, enhancing data accessibility and usability.
- **OLAP and Data Analysis:** Proficient in using Microsoft Analysis Services for the creation of OLAP cubes, including the development of calculated members and sets to support advanced data analysis and reporting

Professional Education

Georgia Institute of Technology

Atlanta, GA

- Master of Science in Electrical Engineering GPA 3.2/4.0 May 1998
- Bachelor of Electrical Engineering GPA 3.4/4.0 May 1996
- President of Eta Kappa Nu – Honor Society

Professional Pilot (Fixed Wings / Rotor Helicopters)

2019 - Current

- Commercially Rated IFR Fixed Wing – Cessna 172, Piper Cherokee, Cirrus SR20, Cirrus SR22
- Commercially Rated Rotor – Robinson R22, Robinson R44

Professional Summary

Shirley is a highly motivated and success-driven Project Manager and Application Consultant with a strong focus on customer success and managed services. Her expertise lies in effectively triaging projects and ensuring timely delivery, all while maintaining a keen eye for detail and a disciplined approach to execution.

With a proven track record of managing complex projects, Shirley excels at coordinating resources, managing timelines, and ensuring that all project objectives are met. Her ability to communicate effectively with both technical and non-technical stakeholders ensures that everyone is aligned and working towards the same goals. Shirley's dedication to customer success drives her to go above and beyond, ensuring that clients are satisfied with the outcomes of their projects. Her disciplined approach and attention to detail make her an invaluable asset to any team, consistently delivering high-quality results.

- **Project Management:** Shirley excels at driving projects to completion, leveraging top-notch communication skills to keep all stakeholders informed and engaged.
- **Customer Success:** Her motivation is rooted in achieving customer satisfaction, consistently delivering solutions that meet and exceed client expectations.
- **Managed Services:** Shirley has a proven track record of ensuring system availability, performance, and security through proactive monitoring and risk mitigation strategies.
- **Interpersonal Skills:** She possesses strong interpersonal skills, enabling her to communicate effectively with both technical and non-technical stakeholders, fostering collaboration and understanding.

Shirley's ability to navigate complex challenges and deliver high-quality results makes her an invaluable asset to any team. Her dedication to customer success and managed services ensures that projects are not only completed on time but also meet the highest standards of quality and reliability.

- **Managed Portfolio** of various high-value clients, ensuring their satisfaction and retention.
- Developed and implemented **client success strategies** that increased client retention.
- Conducted **client meetings to review performance**, address concerns, and identify opportunities for growth.
- Collaborated with cross-functional teams to ensure **service delivery** and resolve client issues promptly.
- Analyzed client feedback & data to identify trends and areas for improvement, to increase client satisfaction.
- Supported the **Client Success Manager** in managing client relationships and ensuring client satisfaction.
- Assisted in the development and execution of client success plans.
- Conducted **client training sessions** and provided ongoing support to ensure successful product adoption.
- Monitored client usage and engagement, providing insights and recommendations to improve outcomes.
- Achieved **client retention** through proactive engagement and support.

Relevant Skills

- **Client Relationship Management:** Expertise in building and maintaining strong client relationships, ensuring long-term satisfaction and loyalty. Skilled in understanding client needs and delivering tailored solutions.

- **Customer Satisfaction:** Proven ability to enhance customer satisfaction through proactive engagement, effective communication, and timely resolution of issues. Consistently received high satisfaction ratings and positive feedback from clients.
- **Strategic Planning:** Adept at developing and implementing strategic plans that align with business goals and drive client success. Experienced in setting objectives, identifying key performance indicators, and measuring outcomes.
- **Team Leadership:** Strong leadership skills with experience in managing and mentoring teams. Ability to inspire and motivate team members to achieve high performance and deliver exceptional client service.
- **Process Improvement:** Skilled in analyzing existing processes and identifying areas for improvement. Implemented process enhancements that increased efficiency, reduced costs, and improved client outcomes.
- **Data Analysis:** Proficient in analyzing client data to identify trends, measure performance, and make data-driven decisions. Experienced in using data to develop insights and recommendations for improving client success.
- **Communication:** Excellent verbal and written communication skills. Capable of conveying complex information clearly and effectively to clients and team members. Strong presentation and negotiation skills.
- **Problem-Solving:** Strong analytical and problem-solving abilities. Experienced in identifying issues, developing solutions, and implementing corrective actions to resolve client concerns and improve satisfaction.

Shirley possesses a diverse and robust skill set that enhances her effectiveness as a Project Manager and Application Consultant. Her expertise spans various tools and competencies, including:

- **Microsoft Office:** Proficient in using Word, Excel, PowerPoint, and Outlook to create, manage, and communicate project-related information efficiently.
- **Customer Relationship Management (CRM) Software:** Proficient in using CRM tools such as Salesforce, HubSpot, or Zoho CRM to manage client interactions, track customer data, and streamline processes.
- **Customer Support Platforms:** Familiar with customer support and ticketing systems like Zendesk, Freshdesk, or Intercom to manage client inquiries and provide efficient support.
- **Data Analysis Tools:** Skilled in using data analysis software like Excel, Tableau, or Power BI to analyze client data, generate reports, and derive actionable insights.
- **SharePoint:** Skilled in leveraging SharePoint for document management, collaboration, and workflow automation, ensuring seamless information sharing and project coordination.
- **Project Management Software:** Experienced with tools like Asana and Monday, which she uses to plan, track, and manage project tasks and timelines effectively.
- **ServiceNow, Fresh Desk, Amelia:** Adept at using these platforms for IT service management, customer support, and automating routine tasks, enhancing service delivery and operational efficiency.
- **Documentation:** Strong ability to create comprehensive and clear documentation, including project plans, reports, and user guides, ensuring all stakeholders have the necessary information.
- **Organization:** Highly organized, capable of managing multiple projects simultaneously while maintaining attention to detail and meeting deadlines.
- **Planning:** Expert in strategic planning, setting objectives, & developing actionable plans to achieve goals.
- **Project Scheduling:** Proficient in creating and maintaining project schedules, ensuring all tasks are completed on time and resources are allocated efficiently.



Project Manager / Application Consultant
Consultant: Shirley Duong

- **Written & Oral Communication:** Excellent communication skills, both written and oral, enabling her to convey complex information clearly and effectively to diverse audiences.

Shirley's comprehensive skill set, combined with her dedication to customer success and managed services, makes her an asset to any organization. Her ability to utilize these tools and competencies ensures that projects are executed smoothly and meet the highest standards of quality.

Clients/Experiences

Cendien – Carrollton, TX

12/2020 - Present

Senior Project Manager / Success Manager

Bon Secours Health Systems/Westchester Medical Center

- Transitioned from Apex e4 Cendien for Managed Services
- FIN/SCM Invoice Matching & EDI/MII Cleanup
- Quarterly Leave Management
- Benefits Empower Indicative File IPA Modification
- GHR Retirement Plan Setup
- Capital Tracking Report
- Labor Distribution Report & DRR
- Trial Balance Report & Benefits Cigna IPA
- LP170 Juneteenth Holiday for Union Employee Reports
- Automate Candidate Disposition & Job Req Closing -
- Payroll NY State Healthcare Worker Bonus
- Smart Reconciliation Project
- Notification for Tax Forms
- Job Requisition Routing IPA

Santa Clara Valley Water

- GHR Reports Development
- Cal PERS Summary Report
- PR Daily Job Action
- Benefits PTSD Report
- Temp Report Out of Time Entry

City of Concord

- Lead Year End Closing Processes
- ADFS Implementation
- Employee Self Service & Open Enrollment
- C1607 - CalPERS Date Shift
- PERS – Longevity Pay
- CalPERS and 980 EE's Payroll Date Errors
- HCM & Payroll Training
- CU v10.0.9 & BSI v11 Upgrades

Cendien Consulting
1846 E Rosemead Pkwy Ste. 200 Carrollton, TX 75007
Phone: 214-245-4580 Fax: 972-559-1184
<http://www.cendien.com>

CAM #25-0377
Exhibit 6
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Project Manager / Application Consultant
Consultant: Shirley Duong

**Regional Transportation
Authority**

- OfferApproval Routing & Notifications
- ApproveDraftRequisition
- RTA_RequisitionApproval
- RTA_JournalEntryApproval

MV Transportation

- Year End Planning & Coordination
- CU v10.0.9 & BSI v11 Upgrades
- Java Apps & WebSphere Upgrades
- IPA Inventory

**Northeast Independent
School District**

- ACA Data Extract
- Team Manager for Tech Team

Responsibilities:

- Monitor & report project milestones & deadlines to client IT executives
- Enter & track issues for review at project team meetings and assign to team members for resolution
- Drafting project ideas and securing approval before each project commences
- Developing new project plans in consultation with stakeholders, including clients and staff
- Planned, delivered, and secured resources for project
- Coordinating with cross discipline team members to make sure that all parties are on track with project requirements, deadlines, and schedules.
- Meeting with project team members to identify and resolve issues.
- Submitting project deliverables and ensuring that they adhere to quality standards.
- Preparing status reports by gathering, analyzing, and summarizing relevant information.
- Establishing effective project communication plans and ensuring their execution.
- Facilitating change requests to ensure that all parties are informed of the impacts on schedule and budget.
- Coordinating the development of user manuals, training materials and other documents as needed to enable successful implementation and turnover of the process or system to the clients.
- Identifying and developing new opportunities with clients.
- Managing customer satisfaction within project transition period.
- Conducting post project evaluation and identifying successful and unsuccessful project elements.
- ERP project oversight

Education

University of Texas at Arlington – Arlington, Texas
Bachelor of Science in Information Systems

8/2016 to 12/2019

Cendien Consulting
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Professional Summary

A highly analytical and solution-focused **Senior Technical ERP Consultant and Project Manager**, proficient in design, administration, development, and analysis. Proven background in **strategic planning** across diverse industries, including corporate finance, healthcare, human capital management, financial services, retail, media, government, publishing, and insurance.

- **Strategic Planning and Execution:** Demonstrates exceptional ability in formulating and executing strategic plans that drive organizational success. His expertise spans multiple industries, allowing him to tailor strategies that meet specific business needs and objectives.
- **Technical Proficiency:** Skilled in leveraging the latest technology to design, develop, and administer Infor solutions. His technical acumen ensures that systems are optimized for performance and aligned with business goals.
- **Cross-Functional Problem Solving:** Recognized as a hands-on, brilliant problem solver with strong interpersonal skills. He excels in rapidly resolving cross-functional business problems by collaborating with various departments and stakeholders. His approach ensures that solutions are comprehensive and effective.
- **Industry Expertise:** With extensive experience in corporate finance, healthcare, human capital management, financial services, retail, media, government, publishing, and insurance, he brings a wealth of knowledge to each project. This diverse background enables him to understand and address industry-specific challenges.
- **Interpersonal and Communication Skills:** Known for his strong interpersonal skills, he effectively communicates with team members, clients, and stakeholders. His ability to convey complex technical information in an understandable manner fosters collaboration and ensures project success.
- **Implementation and Change Management:** Adept at implementing changes that benefit the bottom line. He meticulously plans and manages the implementation process, ensuring that changes are smoothly integrated and deliver measurable improvements.
- **Results-Oriented Approach:** His focus on delivering tangible results drives his work. By utilizing the latest technology and strategic planning, he consistently achieves project goals and enhances organizational performance.

Skills Summary

- **Methodologies:** Proficient in SDLC, Agile, Waterfall, and COBIT methodologies, ensuring structured and efficient project management processes.
- **Core Competencies:** Expertise in Full Project Life Cycle Management, including Research & Analysis, Problem-Solving, and Process Re-engineering. Adept at driving projects from inception to completion with a focus on quality and efficiency.
- **Platforms:** Experienced with multiple platforms, including MS Windows, AIX Unix, and HP Unix, ensuring versatile and adaptable technical skills.
- **Infor ERP Software:** Extensive experience with Infor ERP Software, including Infor Lawson S3 v9.0 – v10, Infor Cloud Suite v11, 4GL/CASE Tools, Portal/LID, Design Studio, Process Flow, Lawson Add-Ins, Lawson Security Administration (LSA) v9.0 - v10, Infor Process Automation (IPA), Infor Spreadsheet Designer, Infor Rich Client,

Landmark, Infor Birst Reporting, and Configuration Console. Proficient in leveraging these tools to optimize business processes and enhance system performance.

- **Programming Languages:** Skilled in multiple programming languages, including Micro Focus Cobol, JavaScript, HTML, XML, Unix Scripting, DB/SQL, MS/SQL, and Oracle/SQL. Capable of developing and maintaining robust software applications.
- **Databases:** Proficient in managing and utilizing various databases, including Oracle, IBM DB2, and Microsoft SQL Server. Experienced in database design, development, and optimization to support business operations.

Clients/Experiences

Cendien

2021 – Present

Senior Infor Consultant/Project Manager

Responsibilities:

Senior Technical Consultant / Project Manager for Cendien involved in all aspects of Project Management, manage development project scope, schedules, risks and issues, dependencies, and communications with our clients.

- Working with Cendien internal teams and managing scope issues, development, process validation, and change management issues impacting our client's ERP system efficiency.
- Work directly with Infor teams to address our client's needs, CU Releases, announcements, and support. Run bi-weekly stand-up meetings with clients to review project goals and progress made.
- Maintain Project Development log and conduct weekly business meetings with clients to ensure successful completion.
- Provide status reports to clients and mitigated project risks and concerns.
- Responsible for Infor Birst Reports development projects, guidance, and resource management.
- Manage client's requests and identify solutions/resources and tracking until completion.
- Provide technical expertise to our clients on the use of Infor ERP System and recommend process improvement to increase productivity.
- Create Project Proposal based on requirements, scope, timeline, allocate resources and assist clients through a successful project completion. Support clients with source control management for IPA's Development.
- Organize training sessions, material for client's teams to ensure a smooth transition after go-live.

Duff & Phelps Inc.

12/2018 – 11/2020

Senior Financial Systems Specialist - Consultant

Responsibilities:

Senior Financial Systems Specialist Consultant for Duff & Phelps Inc was responsible for system analysis, procedures documentation, system administration, development, and support Infor Lawson ERP System.

- Provided support and system analysis and prepared clients for migration Infor Lawson ERP from version 10 to Infor Cloud Suite version 11. Review and analysis of Professional Services Automation, Vendor Management and Financial Suites.
- Created custom and redesigned existing programs to improve applications functionality. Configured and maintained system servers to increase productivity.

- Develop workflows utilizing IPA Tools for Finance, Accounts Payable, Project Activity including AP Invoice Approval Routing, GL Approval Automation, Revenue Billing, Pending Approval Review, New Hire Security Update. Prepared workflows for environment migration to Infor Cloud Suite Financials.
- Managed and supported Infor LSF Security, PSA, Landmark and day-to-day operations, business analysis for future development of enterprise reporting utilizing Business Objects and other reporting solutions.

Convergenx Group /Cowen Inc.

05/2008 – 12/2020

Senior Systems Analyst - Consultant

Responsibilities:

Senior Systems Analyst for Convergenx Group engaged in all aspects of development, analysis and management related to financial systems including ERP System. Presentations, training, procedures documentation as well as system administration, development, and support.

- Ran diverse array of projects from tactical to strategic following project management best practices and methodologies including cost reduction, process improvements, business process design and new functional process/technology introductions.
- Functioned as subject matter expert and provided support for multiple departments including finance, human resources, cash management for Infor Lawson applications, reporting, issues, training.
- Delivered continuous productivity through optimization of current processes via automation initiatives by utilizing latest technologies.
- Developed a variety of IPA workflows for Finance, Accounts Payable, Asset Management and Human Resources including Wire Payments Automation, Automated AP Payment Cycle, Automated Distribution of Reconciliation Reports to Cash Management, Vendor Approval Process, Harris Bank Reconciliation Process Automation, Automated Job Recovery Process, New Hire Approval Process.
- Proven ability to work with and influence executive levels in the organization to recognize benefits of new functional/technology initiatives. Managed third party software vendor's relationships, negotiated contracts, and created annual financial systems plans reflective of corporate initiatives.

The Children's Place, Inc.

05/2006 – 03/2008

Systems Analyst – Consultant

Responsibilities:

As a member of a Lawson technical group was responsible for server-side development, web development, leading clients thru several upgrades and reapplying modifications to a latest version. Collaborated with a client on new requirements, created estimates and provided technical assistance, documentation, business, and systems analysis, as well as system administration and project management.

- Provided support and system analysis for Upgrade from version 8.0 to 8.03 and to LSF 9.0, custom programs migration and redesign, processes analysis and tables structure.
- Implementation and modification of Employee and Manager Self Service Applications version 8.03 and 9.0. Helped in setting up LAUA Security for version 8.03, 9.0 by using new Lawson LSA 9.0 application. Created process for converting existing server/portal users to xml file for LSA 9.0 LDAP database.
- Provided solutions for Stores ESS Portal Development and created Lawson Web API's for version 8.03 and 9.0. Redesigned existing PayFlex/Ceridian CANADA Payroll process to improve functionality and eliminate processing issues.

- Designed and developed TALX Employment Verification System Process and Archive Systems Accounts Payable Automation Process (ETL DataStage).

Jamaica Hospital Medical Center
Programmer/Analyst

06/2003 – 05/2006

Responsibilities:

As a Programmer/Systems Analyst for Jamaica Hospital Medical Center worked alongside the management team to address and develop cost effective solutions for all aspects of the Healthcare process involving Enterprise Resource Management System. As a member of a technical team was responsible for presentations, training, as well as system administration and development.

- Develop solutions for Standard Register Check Printing System, including Employees Payroll, as well as Accounts Payable. Trend Star Interface Process for Finance Department. Interface Procedures for Benefits Department to Winston Financial, as well as Ceridian Corp with file encryption option.
- Interface Development for KRONOS Employee Time Entry System. Time Accrued Update Audit Process to identify zeroes hours accrued, including multiple print files and purge option for zeroes hours accrued records.
- Purchase Order Process Tracking. Capital Agreement Contract Price Model. Requisitions Purge and Verification Process. Cash Flow Audit Process for Finance Department. Journal Entry Audit Interface. Budget vs. Actual Variance Expense Report. Budget Planning and Tracking Process.

INFOR LAWSON SOFTWARE

05/1999 – 06/2003

Programmer/Analyst – Consultant

Responsibilities:

Certified technical consultant specializing in Infor Lawson software systems. Skilled in analysis, design, development, installation, and testing. Experienced in creating custom data conversion programs, extract programs, interfaces, and reports. Proficient in program design, specification development, data mapping, coding, testing, quality assurance, and system installation. Capable of producing user and technical documentation and managing production cut-over.

Education

Polytechnic Institute, Communications and Technology
TCI College of Technology, Industrial Electronics Technology
ASA College, Computer Programming, and Information Technology

Training

Technical Foundation and Server Administration, Application Development Workbench 4GL/CASE/Level I/Level II, Process Flow Administration and Development, Design Studio Development, Lawson ESS/MSS Administration and Development, Financials, Human Capital Management, Procurement.

Professional Summary

Highly **detail-oriented Project Coordinator** with a strong commitment to delivering elegant and user-friendly solutions efficiently and effectively. She excels in **coordinating project activities**, ensuring seamless communication among team members, and maintaining meticulous project documentation. With a solid understanding of front-end development, Aish bridges the gap between technical and non-technical stakeholders, facilitating smooth project execution and timely delivery.

Her ability to **manage project timelines and resources** ensures that projects stay on track and meet their objectives. Aish's proactive approach to problem-solving and her keen eye for detail make her an invaluable asset to any team. She is dedicated to **fostering a collaborative environment** where all team members can thrive and contribute to the project's success.

- **Coordination and Communication:** She ensures all project activities are well-coordinated, fostering seamless communication among team members. Her ability to maintain meticulous project documentation ensures that everyone is on the same page, reducing misunderstandings and enhancing productivity.
- **Technical Proficiency:** With a solid understanding of front-end development, she effectively translates technical requirements into actionable tasks. This proficiency allows her to bridge the gap between technical and non-technical stakeholders, ensuring that project goals are clearly understood and met.
- **Project Management Responsibilities:** In addition to her coordination skills, she takes on comprehensive project management responsibilities. This includes planning and defining project scope, setting realistic and achievable project timelines, and managing resources efficiently. Her strategic planning ensures that projects are well-structured and organized from the outset.
- **Progress Monitoring and Risk Management:** She diligently monitors project progress, identifying potential risks early on. By implementing effective mitigation strategies, she ensures that projects stay on track and any issues are promptly addressed. Her proactive approach minimizes disruptions and keeps the project moving forward smoothly.
- **Multitasking and Problem-Solving:** Her ability to handle multiple tasks and priorities simultaneously is a testament to her strong organizational skills. She excels in problem-solving, quickly finding solutions to challenges that arise during the project lifecycle. This adaptability ensures that projects are completed successfully, even in dynamic and fast-paced environments.
- **Client and Quality Focus:** Throughout the project, she maintains a strong focus on quality and client satisfaction. By regularly engaging with clients and stakeholders, she ensures that their needs and expectations are met. Her dedication to delivering high-quality solutions fosters long-term client relationships and project success.

Skills Summary

- **Project Management:** Skilled in overseeing projects from inception to completion, ensuring all project objectives are met within scope, time, and budget constraints. Adept at planning, executing, and closing projects, while managing resources, timelines, and stakeholder expectations. Proficient in risk management, quality assurance, and performance tracking to drive successful project outcomes.

- **Operations and Supply Chain Management:** Experienced in optimizing operations and supply chain processes to enhance efficiency and productivity. Capable of managing logistics, inventory, and procurement to ensure seamless supply chain operations. Strong analytical skills to identify bottlenecks and implement strategic solutions for continuous improvement and cost reduction.
- **Java, SDLC, SQL:** Proficient in Java programming, with a solid understanding of the Software Development Life Cycle (SDLC). Skilled in SQL for database management and data manipulation. Able to develop, test, and deploy software applications, ensuring they meet user requirements and industry standards.
- **Strong Written & Oral Communication:** Exceptional written and oral communication skills, enabling clear and effective interaction with team members, stakeholders, and clients. Capable of drafting comprehensive reports, documentation, and presentations. Adept at conveying complex technical information in an understandable manner, facilitating collaboration and decision-making.
- **Cybersecurity Expertise:** During her internship at Star Computers, Aishwarya gained hands-on experience in cybersecurity by actively participating in the development and implementation of security protocols. She was responsible for monitoring network traffic, identifying potential threats, and responding to security incidents. This experience not only enhanced her technical skills but also provided her with a deep understanding of the importance of proactive security measures in protecting sensitive data.

Clients / Experiences

Cendien
Client Project Manager

08/2023 - Present

- **Coordinated Project Activities:** Successfully managed and coordinated project activities, ensuring the seamless implementation of Infor ERP Applications. This involved meticulous planning, scheduling, and resource allocation to meet project deadlines and objectives.
- **Cross-Functional Team Collaboration:** Worked closely with cross-functional teams, including developers, designers, and business analysts, to ensure alignment and collaboration towards achieving project goals. Fostered a collaborative environment to enhance team productivity and project success.
- **Project Scope and Requirements Definition:** Defined project scope, objectives, and requirements in close consultation with clients and consultants. Organized and led regular project status meetings, providing comprehensive progress reports to keep clients informed and engaged throughout the project lifecycle.
- **RFP Scope and Requirements Definition:** Developed detailed RFP (Request for Proposal) scopes and requirements to support the bidding process for managed service bids. Ensured clarity and precision in documentation to facilitate accurate and competitive bids.
- **Client IT Executive Meetings:** Regularly met with client IT executives to monitor project milestones and deadlines. Provided detailed reports and updates on project progress, addressing any concerns and ensuring alignment with client expectations.
- **Stakeholder Engagement:** Actively engaged with stakeholders, including clients, team members, and external partners, to ensure effective communication and collaboration. Managed stakeholder expectations and fostered strong relationships to support project success.



Project Coordinator
Consultant: Aishwarya Pappu

Certifications & Education

GITAM University - India - Computer Science and Engineering. Graduated: April 2022

The University of North Texas - Master's in engineering management. Graduated December 2023.

Professional Summary

Javier Silva is a seasoned Technical Manager with over 10 years of experience in leading and managing IT operations, infrastructure, and support services. He has a proven track record of implementing innovative technology solutions that enhance business performance and drive operational efficiency. Javier excels in strategic planning, project management, and team leadership, ensuring that IT initiatives align with organizational goals and deliver measurable results.

Key Strengths:

- **Leadership & Team Management:** Adept at building and leading high-performing IT teams, fostering a collaborative and productive work environment.
- **Project Management:** Skilled in managing complex IT projects from inception to completion, ensuring timely delivery within budget constraints.
- **Technical Expertise:** Extensive knowledge of network infrastructure, cybersecurity, cloud computing, and enterprise software solutions.
- **Strategic Planning:** Proficient in developing and executing IT strategies that support business objectives and drive innovation.
- **Problem-Solving:** Strong analytical skills with the ability to troubleshoot and resolve technical issues efficiently.

Professional Experience:

- **IT Manager, Cendien (2018-Present):** Led a team of 15 IT professionals, overseeing network administration, cybersecurity, and technical support. Successfully implemented a cloud migration project that reduced operational costs by 20%.
- **Senior IT Specialist, EYM (2013-2018):** Managed IT infrastructure and support services for a mid-sized enterprise. Played a key role in the deployment of a company-wide ERP system, improving data accessibility and decision-making processes.
- **IT Consultant, SkyTek Solutions (2010-2013):** Provided IT consulting services to various clients, focusing on network security, system upgrades, and technology integration.

Education & Certifications:

- Bachelor of Science in Information Technology, University of Technology
- Certified Information Systems Security Professional (CISSP)
- Project Management Professional (PMP)
- Certified Information Systems Security Professional (CISSP)

Personal Attributes:

- **Innovative:** Continuously seeks out new technologies and methodologies to improve IT operations.
- **Detail-Oriented:** Ensures accuracy and precision in all aspects of IT management.
- **Communicative:** Excellent interpersonal & communication skills, capable of conveying technical information to non-technical stakeholders.

Relevant Skillset

- **Platforms Expertise:** Possesses extensive experience with a variety of platforms, including Infor CloudSuite, Microsoft Azure, and Office 365. This expertise enables the effective management and optimization of cloud-based solutions, ensuring seamless integration and enhanced productivity across the organization.
- **Proficiency with Tools:** Demonstrates proficiency in utilizing a range of IT tools such as VMware for virtualization, Peplink InControl 2 for network management, and Unifi devices for robust wireless networking solutions. This skill set ensures efficient and reliable IT operations.

Cloud Administration:

- **Platforms:** Extensive experience with Infor CloudSuite, Microsoft Azure, and Office 365.
- **Tools:** Proficient in VMware, Peplink InControl 2, and Unifi devices.
- **Security:** Skilled in configuring and managing cloud-based security measures, including firewalls, VPNs, and access controls, to safeguard data and ensure secure access.

Cybersecurity:

- **Certification:** Certified in Cybersecurity Fundamentals for Engineers (CCFE).
- **Practices:** Expertise in integrating cybersecurity measures into both cloud and on-premises environments, including threat detection, incident response, and vulnerability management.

Artificial Intelligence:

- **Applications:** Proficient in deploying AI technologies such as ChatGPT, Google Gemini, and Laserfiche.
- **Integration:** Experienced in leveraging AI to enhance operational efficiency and improve decision-making processes within cloud environments.

Project Management:

- **Methodologies:** Expertise in planning, organizing, and managing IT projects using advanced methodologies such as Agile, Scrum, and Waterfall.
- **Execution:** Proven track record of managing project scope, timelines, and budgets to deliver solutions that exceed client expectations and drive operational efficiency.

Technical Proficiency:

- **Systems:** Comprehensive knowledge of IT applications including Infor CloudSuite, Syteline, Factory Track, Azure, Office 365, BarTender, QCBD, and VMware.
- **Troubleshooting:** Skilled in diagnosing and resolving technical issues within ERP systems and across diverse IT environments.

Vendor Management:

- **Contracts:** Experienced in negotiating and managing IT contracts to ensure favorable terms and service levels.
- **Coordination:** Proven ability to manage vendor relationships, ensuring optimal service delivery and performance through effective coordination and oversight.

Clients / Experience

Cendien

2016 - Present

Managed Services Technical Consultant / Manager

As a **Managed Services Technical Consultant**, Javier Silva has consistently delivered a comprehensive suite of IT services, utilizing his extensive expertise in various applications and technologies. His ability to integrate and optimize diverse IT systems has enabled him to provide tailored solutions that meet the unique needs of each client. Javier's proactive approach ensures that IT infrastructures are not only robust and secure but also scalable to support future growth.

Key Contributions:

- **Customized IT Solutions:** Developed and implemented bespoke IT strategies that align with clients' business objectives, enhancing operational efficiency and productivity.
- **Technology Integration:** Expertly integrated new technologies with existing systems, ensuring seamless transitions and minimal disruption to business operations.
- **Proactive Maintenance:** Conducted regular system audits and maintenance to preemptively address potential issues, thereby reducing downtime and improving system reliability.
- **Client Support:** Provided exceptional support and training to clients, empowering them to utilize IT resources effectively and independently.
- **Security Enhancements:** Strengthened cybersecurity measures to protect sensitive data and maintain compliance with industry standards and regulations.
- **Assessment:** Conducted thorough reviews of IT inventories, evaluating system efficiency, capacity, speed, and processes. Developed improvement recommendations to prevent emergency maintenance and enhance system performance.
- **Support:** Provided technical support for hardware, software, and network infrastructure. Assisted in the installation, configuration, and troubleshooting of IT systems to ensure smooth operations.
- **Project Implementation:** Led projects involving the deployment of IT solutions, including cloud-based systems, network infrastructure, and cybersecurity measures.

Technical Proficiencies:

- **Applications:** Proficient in a wide range of software applications, including ERP systems, CRM platforms, and productivity tools.
- **Technologies:** Extensive experience with cloud computing, virtualization, network infrastructure, and cybersecurity solutions.
- **Methodologies:** Skilled in ITIL, Agile, and other best practice frameworks for IT service management and project delivery.

Nurse Assist

- **Collaborated with Cross-Functional Teams:** Worked closely with various departments to develop and implement best practices for Office 365 governance, security, and compliance. This collaboration ensured the

protection of sensitive data and adherence to regulatory requirements, fostering a secure and compliant IT environment.

- **Innovative Onboarding Program:** Designed and executed a cutting-edge onboarding program that leveraged the latest Office 365 features and integrations. This program provided new users with a comprehensive overview of the platform's capabilities and best practices, facilitating a smooth transition and enhancing user productivity from day one.
- **Data Collection and Transfer Plan:** Developed and implemented a thorough plan for the collection and transfer of data, accounts, and other resources associated with departing users. This proactive approach minimized the risk of data loss or security breaches, ensuring a seamless and secure transition.
- **Network Security Policies and Procedures:** Created and enforced robust network security policies and procedures that integrated Azure security features such as firewalls, virtual private networks (VPNs), and access controls. These measures ensured secure communication and data transfer between on-premises and cloud environments, enhancing overall network security.
- **IT Project Management Expertise:** Demonstrated proficiency in IT project management methodologies, utilizing a variety of tools and techniques to manage project scope, timelines, and budgets effectively. This expertise ensured the successful delivery of IT projects, meeting organizational goals and client expectations.

Sundance Square / Finline

- **Strategic IT Alignment:** Collaborated with cross-functional teams to ensure that IT strategies were closely aligned with business goals and objectives. This involved facilitating effective communication and coordination across departments, ensuring that IT initiatives supported overall organizational success.
- **Comprehensive IT Infrastructure Implementation:** Designed, planned, and executed the implementation of a robust IT infrastructure. This comprehensive setup included hardware, software, and network components, all optimized for peak system performance and reliability. The result was a resilient and efficient IT environment that supported business operations seamlessly.
- **Leadership in Complex IT Projects:** Spearheaded cross-functional project teams to successfully implement complex IT solutions. This leadership role involved coordinating efforts across various departments, managing project timelines, and ensuring that all project milestones were met. The successful implementation of these solutions significantly enhanced operational capabilities.
- **Mentorship and Team Leadership:** Demonstrated a proven ability to lead and mentor cross-functional teams comprising Cloud architects, engineers, developers, and testers. Ensured effective collaboration and communication within the team, fostering a productive work environment. Delivered high-quality Cloud solutions on time and within budget, meeting or exceeding client expectations.

Certifications

- **Microsoft Certified:** Azure Fundamentals – AZ-900: Demonstrates foundational knowledge of Azure cloud services, including core Azure concepts, services, solutions, and management tools. This certification is ideal for IT managers looking to understand cloud computing and Azure's role in it.

- **Technical Support Fundamentals:** Provides a comprehensive understanding of technical support principles and practices. This certification covers essential skills for troubleshooting and resolving technical issues, making it a great asset for IT managers overseeing support teams.
- **Infor – Infor Industry Essentials: Healthcare – Foundation:** Certification in Infor CloudSuite’s healthcare industry applications. This certification is particularly valuable for IT managers working in the healthcare sector, as it covers the foundational aspects of Infor’s industry-specific solutions.
- **Cybersecurity Fundamentals for Engineers (CCFE):** Certification in fundamental cybersecurity concepts and practices. This certification equips IT managers with the knowledge to implement and manage cybersecurity measures, ensuring the protection of organizational data and systems.
- **Certified Information Systems Security Professional (CISSP):** Recognized globally, this certification validates expertise in designing, implementing, and managing a best-in-class cybersecurity program.
- **Project Management Professional (PMP):** This certification demonstrates proficiency in project management, including planning, executing, and closing projects, ensuring they are completed on time and within budget.
- **Certified Cloud Security Professional (CCSP):** Focuses on cloud security architecture, design, operations, and service orchestration. Ideal for IT managers overseeing cloud environments.
- **ITIL Foundation Certification:** Provides a comprehensive understanding of IT service management best practices, focusing on aligning IT services with business needs.
- **CompTIA Network+:** Validates the essential knowledge and skills needed to design, configure, manage, and troubleshoot wired and wireless networks.
- **Certified Ethical Hacker (CEH):** Equips IT managers with the skills to think and act like a hacker, identifying and addressing security vulnerabilities before they can be exploited.
- **AWS Certified Solutions Architect:** Demonstrates expertise in designing and deploying scalable systems on Amazon Web Services (AWS).
- **Certified Data Privacy Solutions Engineer (CDPSE):** Focuses on implementing privacy solutions and managing data privacy risks, ensuring compliance with global privacy standards.
- **Cisco Certified Network Professional (CCNP):** Validates advanced knowledge and skills required to manage complex network solutions.
- **Certified Information Security Manager (CISM):** Focuses on managing and governing an enterprise’s information security program.

Professional Summary

Imran is a highly experienced **Senior Principal Consultant** with over 13 years of extensive expertise in system administration and **Infor CloudSuite, S3, Landmark, GHR, Cloud, and EAM** software. His career has been marked by a deep engagement in support, installation, implementation, and development activities across these platforms. Imran's role has required him to navigate both technical and managerial aspects, ensuring that operations run seamlessly, and clients are consistently satisfied. His proficiency in these areas has made him an asset in any project, contributing to the successful deployment and maintenance of complex systems.

Throughout his career, Imran has demonstrated a robust understanding of various operating environments, including Microsoft Windows Server and Unix. He is proficient in database management with MS SQL Server and Oracle and has a proven track record of implementing and supporting Infor S3 and EAM. Imran's expertise extends to the installation of third-party products such as Web servers, WebSphere, JAVA, Perl, Bouncy Castle, Net Express, Cygwin, and LUU.

His commitment to continuous professional development is evident through his numerous certifications, including PMI - PMP Essentials Curriculum, Certified Infor Landmark Developer, Certified Lawson Administrator, Certified IPA Developer, Certified Lawson Security Consultant, Certified Infor OS Consultant, and Certified Landmark Cloud Administrator. His qualifications underscore a dedication to staying at the forefront of technological advancements and delivering exceptional results for his clients.

- **13+ years of Infor expertise:** Certified in multiple technical development tools, showcasing a robust understanding and proficiency in the field.
- **Analytical problem-solver:** Skilled at anticipating and resolving issues efficiently, ensuring minimal disruption to operations.
- **Operational efficiency:** Proficient in devising methods that streamline operations and enhance efficiency, significantly contributing to overall organizational productivity.
- **Client and team rapport:** Adept at building excellent relationships with clients and team members, fostering a collaborative and productive work environment.
- **Technical leadership:** Demonstrated ability to lead technical projects from conception to completion, ensuring alignment with business goals and client needs.
- **Innovative solutions:** Experienced in developing innovative solutions to complex technical challenges, driving continuous improvement and operational excellence.
- **Comprehensive support:** Provided comprehensive support across various Infor modules, ensuring optimal performance and user satisfaction.

Technical Skills:

- **Operating Systems:** Extensive experience with Microsoft Windows Server (2019, 2012, 2008, 2003), Windows 11, 10, 8, 7, XP, and Unix, showcasing a broad understanding of various operating environments.
- **Databases:** Proficient in MS SQL Server and Oracle, ensuring reliable database management and support.
- **Software & Systems:** Expertise in Infor S3, Portal, LSA, LID, RQC, EMSS, LSA, LRM, LTM, CSF Design Studio & Add-ins Installation, Implementation, and Support. Skilled in the implementation and support of Infor S3 and



Infor Systems Consultant and Technical Support
Consultant: Imran Khan

EAM. Experienced in installing third-party products like Web servers, WebSphere, JAVA, Perl, Bouncy Castle, Net Express, Cygwin, and LUU.

- **Certifications:** PMI - PMP Essentials Curriculum, Certified Landmark Developer, Certified Lawson Administrator, Certified IPA Developer, Certified Lawson Security Consultant, Certified Infor OS Consultant, Certified Landmark Cloud Administrator, reflecting a commitment to continuous professional development.

Clients/Experiences

Cendien – Carrollton, TX

02/2018 – Present

Senior Infor Lawson Consultant

Imran has been responsible for the comprehensive installation and migration of Lawson System Foundation Core Technology, ensuring robust and reliable system performance. His expertise in managing the installation and maintenance of various Infor Applications, including Infor Landmark, Rich Client, IPA, Lawson, Portal, Lawson Security Administrator, LID, Requisition Centre, EMSS, LSA, LRM, LTM, Design Studio & Add-ins, has ensured seamless integration and functionality across systems.

In addition, Imran has led the implementation and customization of Infor S3 and EAM software, overseeing projects from requirements analysis through to go-live and post-live support. His meticulous management of the installation of Infor S3 CTP, MSP, and ESP patches has maintained system currency and performance, ensuring successful project delivery and client satisfaction.

Responsibilities:

- Responsible for the comprehensive installation and migration of Lawson System Foundation Core Technology, ensuring robust and reliable system performance.
- Managed the installation and maintenance of various Infor Applications, including Infor Landmark, Rich Client, IPA, Lawson, Portal, Lawson Security Administrator, LID, Requisition Centre, EMSS, LSA, LRM, LTM, Design Studio & Add-ins, ensuring seamless integration and functionality.
- Led the implementation and customization of Infor S3 / EAM software, from requirements analysis through to go-live and post-live support, ensuring successful project delivery. Managed the installation of Infor S3 CTP / MSP / ESP patches, maintaining system currency and performance.

Ciber

03/2015 – 01/2018

Senior Principal Infor Consultant

Responsibilities:

- Oversaw the installation and migration of Lawson System Foundation Core Technology, ensuring smooth transitions and minimal downtime.
- Directed the installation and maintenance of various Infor Applications, including Infor Landmark, Rich Client, IPA, Lawson, Portal, Lawson Security Administrator, LID, Requisition Centre, EMSS, LSA, LRM, LTM, Design Studio & Add-ins, ensuring optimal performance and user satisfaction.
- Spearheaded the implementation and customization of Infor S3 / EAM software, managing the process from requirements analysis to go-live and post-live support. Handled the installation of Infor S3 CTP / MSP / ESP patches, ensuring systems were up-to-date and secure.
- Led an offshore Managed Services team, resolving incidents and problems for various clients as per SLA, ensuring high levels of client satisfaction and operational efficiency.

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General Authority of Civil Aviation – Jeddah (KSA)
CMMS Administrator (Infor EAM)

08/2010 – 03/2015

Responsibilities:

- Served as an EAM Techno Functional Consultant, responsible for the installation, maintenance, and customization of Infor EAM servers (Infor EAM 8.2 & 10.1 Application, Data (Oracle 10g), and Report server (Cognos)), ensuring reliable and efficient system performance.
- Conducted application troubleshooting for Infor EAM, providing basic administration of Oracle databases using TOAD. Implemented and maintained multiple Infor EAM instances (development, test, training, and production), ensuring robust and reliable environments.
- Developed SOPs for all EAM instances and interfaces, customizing and designing workflows, forms, fields, and functionality to meet management requirements. Managed and trained 400 user profiles, ensuring effective use of the system.

Rajab & Silsilah Company – Jeddah (KSA)
Computer Administrator

05/2007 – 08/2010

Responsibilities:

- Managed the day-to-day administration and maintenance of data networks, IT requirements, and daily troubleshooting for desktops, laptops, servers, printers, switches, access points, and ADSL routers. Oversaw the operation and maintenance of the C.M.M.S. system (Infor EAM), ensuring reliable and efficient performance.
- Handled the installation and maintenance of desktops and laptops, managing internet access and restrictions as per company policy. Updated server patches and security updates, ensuring system security and reliability.
- Conducted the installation and troubleshooting of LAN/WAN, ADSL routers, switches, and wireless networks (access points). Installed and implemented DIA WAN networks, including CISCO routers, switches, and access points, ensuring robust and reliable network performance.

CMS Computer Ltd. – Udaipur (India)
Facility Management Services Engineer

06/2006 – 04/2007

Responsibilities:

- Addressed calls, complaints, problems, and change requests, ensuring timely and effective resolution.
- Monitored server performance, fine-tuned systems, diagnosed and resolved server problems. Supported regular upgrades of various operating systems and office applications, managing antivirus definitions and software patches.
- Managed and administered network security, troubleshooting computer hardware, and installing various software and drivers, ensuring reliable and secure system performance.

Education

- **Bachelor of Science** - Information Technology
- **Masters of Science** - Computer Science
- **Diploma** - Information Technology & System Management

Professional Summary

Sunil is an accomplished Information Technology professional and dynamic IT Leader with over 25 years of extensive expertise in Lawson ERP system implementation across various industries, including financial services, municipal government, educational institutions, non-profit, legal, and retail sectors. He possesses strong technical and analytical problem-solving skills and has a proven ability to simultaneously manage multiple high-complexity projects. Sunil has significant depth in Infor's on-premise, cloud, and hybrid architectures.

- **Extensive Expertise:** Over 25 years of experience with Lawson ERP system implementation, covering a wide range of industries.
- **Technical Proficiency:** Strong technical skills in installation, configuration, and customization of Infor Lawson products.
- **Project Management:** Proven ability to manage multiple high-complexity projects simultaneously, ensuring timely and successful delivery.

Key Responsibilities and Achievements:

- **Installation and Configuration:** Installed LSF10, Landmark, and Mingle in private data centers, public clouds (AWS, Azure), and on-premise environments. Completed federation and data migration from on-premise to cloud (AWS and Azure).
- **ADFS Setup:** Installed and configured ADFS, setting up ADFS trust between LSF10/CloudSuite ADFS and customer ADFS.
- **IPA Automation:** Developed multiple IPA flows after analyzing complex business requirements, handling IPA automation and administration, File Channel, and Scheduler.
- **Infor Solutions:** Managed modifications, enhancements, data conversions, interfaces, integration, version upgrades/migration, and reporting for Infor V10/V11/Lawson S3 and CloudSuite Software. Demonstrated strong technical expertise in all application areas.
- **Upgrades and Migrations:** Completed numerous LSF9 to LSF10 upgrades and LSF10 migrations from on-premise to private and public clouds (AWS and Azure), including data migration, GEN data conversion, users, security, jobs, print files, and bookmarks.
- **Customization and Configuration:** Customized and configured Lawson application programs using Lawson case tools, UNIX scripts, process automation, and interface development using Perl scripts.
- **Security Administration:** Administered and customized security using Configuration Console and LPL in Security Roles, Security Classes, Menus, and WebApps for Landmark applications and CloudSuite.
- **Self-Service Solutions:** Installed and configured Employee Self-Service and Manager Self-Service (EMSS).
- **Reporting and Design:** Utilized Infor/Lawson Design Studio and Lawson Reporting Suite for dashboard design and custom report page creation.
- **Data Conversion:** Experienced in large volumes of data conversion/migration and test plans.
- **Performance Tuning:** Conducted performance tuning for LSF, Landmark systems, and database tuning on complex queries.
- **Tax Factory Integration:** Installed and configured BSI Tax Factory with DB2, Oracle, and SQL Server.
- **Software Integration:** Integrated ImageNow and MHC Software with Lawson applications.
- **Web Development:** Experienced in web development using XML, Java, Servlets, and JavaScript.

Skillset Summary

Infor Products and Applications:

- Lawson S3: HR and Financials (versions 8, 9, 10), Cloud Suite, Landmark LTM/GHR/SCM/FSM
- Employee Space, Supplier Portal, APIA
- Employee/Manager Self-service, RQC, Punchout
- BSI, Kronos, Fax Integrator, EDI, XM
- MCM, LBI, LSO
- ImageNow, MHC

Infor/Lawson Tools and Languages:

- Installer: LSF (all extensions), Mingle, Landmark
- Case Tools: COBOL and COBOL Animator, Design Studio, Configuration Console, MS Add-in
- IPA Development/Administration, LPL
- LSF Administration: Lawson certified
- Landmark Security, Landmark Upgrades
- SQL, Shell Script, PowerShell, AWS Cloud
- ADFS: Installation and configuration with third-party IdPs

Clients / Experience

Cendien

2022 – Present

Senior Infor Technical Consultant

Sunil provides continuous support to a diverse range of clients as they transition from the v10 “shared services” model to a cloud-based infrastructure. His primary objective is to ensure a smooth and efficient migration process, meticulously planning and coordinating each step to minimize disruption. Sunil's expertise in managing complex migrations allows him to quickly identify and resolve any issues that arise, ensuring that operational performance remains high throughout the transition. By maintaining regular communication with clients and addressing their concerns promptly, he ensures that client satisfaction is consistently achieved. Post-migration, Sunil continues to offer support, helping clients adapt to their new cloud-based systems and ensuring that any remaining issues are swiftly resolved. His dedication to excellence and client-focused approach make him an invaluable asset in facilitating seamless transitions to cloud-based infrastructures.

- **Continuous Client Support:** Provide ongoing support to clients throughout the migration process, addressing any issues that arise and ensuring a seamless transition.
- **Migration Management:** Oversee the migration from the v10 “shared services” model to a cloud-based infrastructure, ensuring that all steps are executed efficiently and effectively.
- **Operational Performance:** Maintain high levels of operational performance during the migration, ensuring that clients experience minimal disruption and continue to operate smoothly.
- **Client Satisfaction:** Focus on client satisfaction by providing timely and effective solutions, maintaining open communication, and ensuring that client needs are met throughout the migration process.

Key Responsibilities:

- **Planning and Coordination:** Develop detailed migration plans, coordinate with client teams, and manage resources to ensure a smooth transition.
- **Issue Resolution:** Quickly identify and resolve any issues that arise during the migration, minimizing downtime and ensuring continuous operation.
- **Performance Monitoring:** Monitor system performance throughout the migration, making adjustments as needed to maintain optimal performance.
- **Client Communication:** Maintain regular communication with clients, providing updates on the migration process and addressing any concerns they may have.
- **Post-Migration Support:** Provide ongoing support after the migration is complete, ensuring that clients are fully comfortable with the new cloud-based infrastructure and that any remaining issues are resolved.

Sunil's expertise in managing complex migrations and his commitment to client satisfaction make him an invaluable asset to this project. His ability to ensure a smooth and efficient transition to a cloud-based infrastructure will help clients achieve their operational goals while maintaining high levels of performance and satisfaction.

Role and Contributions:

- **Migration Planning:** Developing comprehensive migration plans for each client, outlining the steps and timelines for transitioning to the cloud. This includes assessing current systems, identifying potential challenges, and devising strategies to mitigate risks.
- **Data Conversion and Migration:** Leading the data conversion and migration process, ensuring that all data is accurately and securely transferred to the cloud. This involves rigorous testing and validation to maintain data integrity and minimize downtime.
- **Cloud Implementation:** Implementing cloud solutions that are customized to meet the unique requirements of each client. This includes configuring cloud environments, setting up necessary applications, and ensuring seamless integration with existing systems.
- **Ongoing Support:** Providing continuous support to clients, addressing any issues that arise during and after the migration process. This includes troubleshooting, system updates, and performance monitoring to ensure sustained operational efficiency.
- **User Training and Support:** Offering extensive training and support to clients, ensuring they are well-equipped to utilize the new cloud-based systems. Creating detailed documentation and conducting training sessions to facilitate a smooth transition.

Velocity Technology Solutions

09/2008 – 04/2022

Lawson ERP technical lead/Cloud architect

Velocity is a Managed Cloud Service provider company and hosts over 200 Infor/Lawson Enterprise customers in its private and public cloud. Being a part of a professional services team, following are the key tasks that I performed during my career at Velocity

- Lead and executed the migration of many Infor/Lawson v9 and V10 customers from private cloud to public cloud (AWS and Azure). Worked directly with Client Project Teams to develop, implement, test, rollout, and train personnel on Lawson/Infor products
- Installed/built many LSF, Landmark and Ming.le systems for various customers on premise, private cloud and public clouds. Worked extensively with Vendors to validate the installation for whole Lawson suite and assisted them with required information, to meet Aggressive deadlines.
- Completed many ADFS implementations with Infor products (LSF, Ming.le, Landmark, MSCM, LSO etc)
- Assisted with kickoffs, requirement gathering and knowledge transfer sessions that provide clarity and direction aligned with Infor Lawson deployment methodology
- Developed IPA to do Confidential data upload. Implemented Security for Req approval and Invoice approval flow. Worked on many IPA flows to automate third party system integration
- Worked on many GHR, APIA, SCM flows which creates interface files for 3rd Party applications and modified/delivered same to meet the customer's requirements.
- Security Administration and configuration using LAUA, LSF and Landmark Security. (LPL editor)
- Mentor of back-office team members. Conducted many brown bags meeting on EDI, RQC, Punchout, Web sphere vulnerability patching, IPA configuration, Landmark data refresh etc.
- Migrated/retrofitted Lawson Portal/IPA/EMSS/RQC/Design Studio Customizations from 8 to 9, 9 to 10
- Provided support for the ImageNow Imaging and Data Capture Application and the Lawson ERP System
- Analyzed, manipulated, and updated the Database (Oracle, MS SQL, DB2) using SQL. Involved in backend testing to verify data integrity by using SQL
- Worked on Cerner/open link patient refund interface from Lawson

Anheuser-Busch Inc., St. Louis MO

2002 - 2008

Lawson System Support – Retail Marketing

This project is focused on the development of enhancements and the provision of ongoing support for the Merchandising System of Anheuser-Busch Inc. (A-BI), the renowned beer subsidiary. The system is built on the robust Lawson Software enterprise resource planning (ERP) package, which is integral to the company's operations.

Key Objectives:

- **Enhancement Development:** Implementing new features and functionalities to improve the efficiency and effectiveness of the Merchandising System. This includes customizing the ERP package to meet the specific needs of A-BI, ensuring it aligns with their business processes and goals.
- **System Support:** Providing comprehensive support to maintain the stability and performance of the Merchandising System. This involves troubleshooting issues, performing regular updates, and ensuring the system operates smoothly without interruptions.
- **Optimization:** Continuously analyzing the system's performance and identifying areas for improvement. This includes optimizing workflows, enhancing user interfaces, and integrating new technologies to keep the system up-to-date and competitive.
- **User Training and Support:** Offering training sessions and support to A-BI staff to ensure they are proficient in using the enhanced system. This helps in maximizing the benefits of the ERP package and ensures that users can leverage its full potential.

Project Impact:

- **Increased Efficiency:** By developing targeted enhancements, the project aims to streamline operations, reduce manual processes, and improve overall productivity within the Merchandising System.
- **Improved User Experience:** Enhancements and support efforts are designed to create a more intuitive and user-friendly system, making it easier for staff to perform their tasks effectively.
- **Business Alignment:** Customizing the ERP package to fit A-BI's unique requirements ensures that the system supports the company's strategic objectives and operational needs.
- **Sustained Performance:** Ongoing support and regular updates help maintain the system's reliability and performance, minimizing downtime and ensuring continuous business operations.

Cessna Aircraft Company, Wichita, KS
Lawson Implementation

1999 - 2002

This comprehensive project involved the implementation of the Lawson ERP system for a manufacturing company, executed in three distinct phases. The project aimed to modernize the company's operations by transitioning from a legacy system to a more advanced and integrated ERP solution.

Key Phases:

1. Conversion of Legacy System:

- **Objective:** Transitioning from the outdated legacy system to the new Lawson ERP system.
- **Activities:** This phase involved meticulous planning and execution to ensure data integrity and continuity. It included data migration, system configuration, and validation to ensure that all historical data was accurately transferred and accessible in the new system.

2. Implementation of Lawson and Development of Additional Modules:

- **Objective:** Deploying the core Lawson ERP system and developing additional modules tailored to the manufacturing processes.
- **Activities:** This phase focused on the installation and configuration of the Lawson ERP system, followed by the development of custom modules to address specific business needs. These modules were designed to enhance functionality and support various manufacturing operations, ensuring the system met all operational requirements.

3. Integration of Lawson System with Web Application and Production Support:

- **Objective:** Integrating the Lawson ERP system with existing web applications and providing ongoing production support.
- **Activities:** This phase involved the seamless integration of the ERP system with web-based applications to facilitate real-time data access and process automation. Additionally, it included setting up production support mechanisms to ensure continuous system performance and address any issues promptly.

Role and Contributions:

- **Active Involvement:** Played a crucial role in all phases of the project, from the initial conversion of the legacy system to the final integration and production support.
- **Data Migration:** Ensured accurate and efficient data migration, maintaining data integrity throughout the transition.

- **System Configuration:** Configured the Lawson ERP system and developed additional modules to meet the specific needs of the manufacturing processes.
- **Integration:** Facilitated the integration of the ERP system with web applications, enhancing system functionality and user accessibility.
- **Production Support:** Provided ongoing support to ensure the system's reliability and performance, addressing any issues that arose during and after the implementation.

Project Impact:

- **Modernized Operations:** Successfully transitioned the company from a legacy system to a modern ERP solution, improving overall operational efficiency.
- **Enhanced Functionality:** Developed custom modules that enhanced the ERP system's capabilities, supporting the unique needs of the manufacturing processes.
- **Improved Integration:** Achieved seamless integration with web applications, enabling real-time data access and streamlined operations.
- **Sustained Performance:** Established robust production support mechanisms, ensuring continuous system performance and reliability.

This project was pivotal in transforming the manufacturing company's operations, leveraging the capabilities of the Lawson ERP system to achieve greater efficiency, functionality, and integration.

Dallas Area Rapid Transit Authority for KPMG
Lawson Migration Consultant

1997 - 1999

This project entailed the migration of DART's systems from IBM Mainframe to the Lawson Client/Server platform, encompassing HR/Payroll, Financial, and Supply Chain Management software. The primary goal was to modernize DART's IT infrastructure, enhancing efficiency and functionality across various departments.

Key Objectives:

- **System Migration:** Transitioning from the legacy IBM Mainframe systems to the more advanced Lawson Client/Server platform.
- **Data Conversion and Migration:** Developing and executing a comprehensive data conversion and migration test plan to ensure data integrity and seamless transition.
- **Implementation of Lawson Software:** Deploying Lawson HR/Payroll, Financial, and Supply Chain Management software to replace the existing mainframe systems.

Role and Contributions:

- **Data Conversion and Migration Test Plan:** Successfully developed and executed a detailed test plan for data conversion and migration. This involved meticulous planning and testing to ensure all data was accurately transferred from the IBM Mainframe to the Lawson Client/Server systems.
- **System Configuration:** Configured the Lawson software to meet DART's specific requirements, ensuring that the new system was fully functional and aligned with the organization's operational needs.
- **Testing and Validation:** Conducted extensive testing and validation to ensure the accuracy and reliability of the migrated data. This included verifying data integrity, functionality, and performance of the new system.

- **User Training and Support:** Provided training and support to DART staff to ensure a smooth transition to the new system. This included creating user manuals, conducting training sessions, and offering ongoing support to address any issues that arose during the migration process.

Project Impact:

- **Modernized IT Infrastructure:** Successfully transitioned DART from outdated IBM Mainframe systems to a modern Lawson Client/Server platform, significantly enhancing operational efficiency.
- **Improved Data Integrity:** Ensured accurate and reliable data migration, maintaining data integrity throughout the transition process.
- **Enhanced System Functionality:** Implemented Lawson HR/Payroll, Financial, and Supply Chain Management software, providing DART with advanced tools and functionalities to support their operations.
- **User Empowerment:** Equipped DART staff with the necessary skills and knowledge to effectively use the new system, ensuring a smooth and successful transition.

This project was a critical initiative for DART, aimed at modernizing their IT infrastructure and enhancing the efficiency and functionality of their HR/Payroll, Financial, and Supply Chain Management systems. The successful development and execution of the data conversion and migration test plan were pivotal in achieving these objectives.

IIS Infotech Ltd. New Delhi India

1994 - 1997

This project involved the design and development of the Investors Voluntary Redemption and Sales (IVORS) system, a pilot initiative for the Depository Trust Company (DTC) in New York. The primary objective was to create a robust and efficient system to manage voluntary redemption and sales processes for investors.

Key Objectives:

- **System Design:** Creating a comprehensive design for the IVORS system that meets the specific needs of DTC and its investors.
- **System Development:** Developing the IVORS system with a focus on functionality, reliability, and user-friendliness.
- **Pilot Implementation:** Implementing the IVORS system as a pilot project to test its effectiveness and gather feedback for further improvements.

Role and Contributions:

- **System Design:** Led the design phase, ensuring that the IVORS system architecture was robust, scalable, and aligned with DTC's requirements. This involved detailed planning and collaboration with stakeholders to define system specifications and functionalities.
- **System Development:** Developed the IVORS system, incorporating advanced features to facilitate voluntary redemption and sales processes. This included coding, testing, and debugging to ensure the system was reliable and efficient.
- **Pilot Implementation:** Successfully implemented the IVORS system as a pilot project, overseeing the deployment and initial operation. Collected and analyzed feedback from users to identify areas for improvement and ensure the system met their needs.

- **User Training and Support:** Provided training and support to DTC staff and investors, ensuring they were proficient in using the new system. Created user manuals and conducted training sessions to facilitate a smooth transition.

Project Impact:

- **Enhanced Efficiency:** The IVORS system streamlined voluntary redemption and sales processes, reducing manual effort and increasing operational efficiency.
- **Improved User Experience:** Designed with user-friendliness in mind, the IVORS system provided a seamless experience for investors and DTC staff, making it easier to manage transactions.
- **Scalability:** The pilot implementation demonstrated the system's scalability, paving the way for potential full-scale deployment across DTC's operations.
- **Valuable Feedback:** The pilot project provided valuable insights and feedback, which were used to refine and enhance the system, ensuring it met the highest standards of performance and reliability.

This project was a significant initiative for the Depository Trust Company, aimed at modernizing and improving the management of voluntary redemption and sales processes for investors. The successful design and development of the IVORS system marked a key milestone in achieving these goals.

Education

- **Master of Science in Computer Science** from University of Missouri
- **Bachelor of Science in Mechanical Engineering**
- Currently pursuing MBA from Webster University St. Louis.MO
- AWS Certified Cloud Practitioner, Mar 2021
- Lawson Certified - LSF administration

Professional Summary

Alistair is a dynamic Infor Technical Consultant with over two decades of extensive experience in Unix-based large-scale platform implementations, specializing in Infor Lawson's and CloudSuite suite of products. His expertise spans cloud administration, cybersecurity integration, and AI applications, consistently delivering customized solutions that exceed client expectations. Alistair has a proven track record in project leadership, system optimization, and seamless migrations, particularly within public sector and governmental environments.

Professional Summary:

- **Extensive Experience:** Over 20 years of hands-on experience in implementing and managing Unix-based platforms, ensuring robust and reliable system performance.
- **Infor Lawson Specialization:** Deep expertise in Infor Lawson's suite of products, including installation, customization, and support, tailored to meet diverse client needs.
- **Cloud Administration:** Skilled in managing cloud environments, optimizing resources, and ensuring secure and efficient operations.
- **Cybersecurity Integration:** Proficient in integrating advanced cybersecurity measures to protect systems and data, ensuring compliance with industry standards.
- **AI Applications:** Leveraging artificial intelligence to enhance system capabilities, streamline operations, and provide innovative solutions.
- **Project Leadership:** Demonstrated ability to lead complex projects from inception to completion, ensuring timely delivery and client satisfaction.
- **System Optimization:** Expertise in optimizing systems for maximum efficiency and performance, reducing costs and improving productivity.
- **Seamless Migrations:** Successfully managed numerous migrations, ensuring minimal disruption and smooth transitions to new platforms.
- **Public Sector and Governmental Environments:** Extensive experience working within public sector and governmental settings, understanding their unique challenges and requirements.

Alistair's comprehensive skill set and dedication to delivering high-quality solutions make him an invaluable asset to any organization. His ability to navigate complex technical landscapes and provide tailored, innovative solutions ensures that he consistently meets and exceeds client expectations.

Relevant Skills

Infor Lawson S3:

- Demonstrates extensive proficiency in Financials (FIN), Supply Chain Management (SCM), and Global Human Resources/Payroll (GHR/Payroll) modules.
- Expert in Landmark and Landmark Grid, ensuring robust and efficient system performance.

Cloud Administration:

- Possesses a strong command of IBM AIX, Linux, and Windows Server, specializing in server builds, configurations, and data migrations.
- Skilled in optimizing cloud environments for enhanced performance and reliability.



Senior Technical Consultant and Infor Lawson Specialist
Consultant: Alistair Hull

Cybersecurity:

- Integrates robust cybersecurity measures, including Active Directory Federation Services (ADFS) and Lightweight Directory Access Protocol (LDAP) integration, to ensure secure and compliant operations.

Artificial Intelligence:

- Applies advanced AI solutions in cloud environments, utilizing tools such as ChatGPT, Google Gemini, and Laserfiche to enhance system capabilities and streamline operations.

Database Management:

- Proficient in managing Oracle and DB/2 databases, with expertise in data migrations and performance tuning to ensure optimal database performance and reliability.

System Integration:

- Expertise in integrating systems using WebSphere Application Server and Tivoli Directory Server (Tivoli DS), ensuring seamless and efficient system integrations.

Clients/Experiences

Cendien – Carrollton, TX

05/2023 - Present

Senior Infor Technical Consultant

Alistair's role at Cendien showcases his ability to lead complex projects and implement advanced technological solutions that meet the unique needs of public sector clients. His expertise in cybersecurity, cloud administration, and AI integration ensures that clients receive top-tier support and innovative solutions that drive efficiency and strategic success.

- **Spearheaded Implementations and Support:** Led the implementation and support of Infor CloudSuite Software for public sector clients, specializing in Financials (FIN), Supply Chain Management (SCM), and Global Human Resources/Payroll (GHR/Payroll) modules. Ensured all solutions were fully compliant with regulatory frameworks, enhancing operational efficiency and accountability.
- **Cybersecurity Leadership:** Conducted comprehensive cybersecurity assessments and implemented customized solutions to bolster data security and compliance for government agencies. This included integrating advanced security measures and protocols to protect sensitive information.
- **Cloud Administration Expertise:** Designed and executed robust cloud administration strategies utilizing IBM AIX, Linux, and Windows Server. Optimized infrastructure to ensure high availability, scalability, and performance, meeting the demanding needs of public sector operations.
- **AI Technology Integration:** Leveraged cutting-edge AI technologies, such as ChatGPT and Google Gemini, to streamline processes and enhance decision-making capabilities within governmental operations. These innovations improved efficiency and provided valuable insights for strategic planning.
- **Project Management and Consultancy:** Managed significant upgrade projects, providing expert consultancy on business process improvements tailored to the unique requirements of public sector clients. Delivered solutions that drove operational excellence and supported long-term strategic goals.

Cendien Consulting
1846 E Rosemeade Pkwy Ste. 200 Carrollton, TX 75007
Phone: 214-245-4580 Fax: 972-559-1184
<http://www.cendien.com>

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Senior Technical Consultant and Infor Lawson Specialist
Consultant: Alistair Hull

| | |
|--|-------------|
| Infor (formerly Lawson Software) - PA | 1996 – 2023 |
| Senior Principal Technical Consultant | 2007 – 2023 |
| Advisory Technical Consultant | 2002 - 2007 |
| Senior Technical Consultant | 1996 – 2002 |

Alistair's comprehensive skill set and dedication to excellence have made him a key player in ensuring the success of public sector IT projects. His ability to manage complex migrations, enhance system performance, and implement robust security measures has consistently delivered outstanding results for his clients.

Responsibilities:

- **Executed Windows Migrations:** Successfully managed the migration of public sector clients from Windows 2012 to Windows 2019, ensuring alignment with end-of-life deadlines. This involved meticulous planning and execution to minimize downtime and ensure a smooth transition. Alistair's strategic approach ensured that all systems were updated efficiently, maintaining operational continuity.
- **Designed and Implemented Infor Solutions:** Developed and deployed new 2019 Infor solution builds, maintaining essential functionalities for governmental operations. This ensured that critical processes continued without interruption and met the specific needs of public sector clients. Alistair's solutions were tailored to enhance performance and reliability, supporting the unique requirements of public sector environments.
- **Performance Analysis and Tuning:** Conducted in-depth performance analysis and tuning for Infor Lawson Systems Foundation and Landmark systems. These efforts significantly enhanced system efficiency and reliability, providing a better user experience. Alistair's expertise in performance tuning ensured that systems operated at peak efficiency, reducing downtime and improving user satisfaction.
- **Led Data Migrations:** Directed seamless data migrations from legacy systems to Infor FSM/GHR, ensuring minimal disruption to operations and maintaining data integrity. This included comprehensive planning and execution to ensure all data was accurately transferred and fully functional in the new system. Alistair's meticulous attention to detail ensured that data migrations were smooth and error-free.
- **Implemented Security Conversions:** Successfully converted LS as STS to ADFS, integrating LSF, Landmark, and InforOS with Infor Federation Services. This enhanced security measures and ensured compliance with industry standards, protecting sensitive governmental data. Alistair's focus on security ensured that all systems were protected against potential threats, maintaining data integrity and compliance.
- **Deployed High Availability Solutions:** Implemented IBM AIX High Availability solutions, providing robust failover capabilities for critical governmental operations. This ensured continuous system availability and reliability, even in the event of hardware failures. Alistair's high availability solutions ensured that critical systems remained operational, supporting the uninterrupted delivery of public services.

Education

BSc in Computer Science | University of Brighton, England
InforS3/Landmark Install/Administration | Server Builds | Server and Data Migrations | S3/LMK 10->11 Upgrades

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Professional Summary

Nicole is a seasoned Software Engineer with over 30 years of experience in analysis, design, programming, testing, security setup, data conversions, and implementations. She has over 27 years of expertise with Lawson ERP Applications versions 9 and 10, as well as Infor Landmark CloudSuite v11 FSM/HCM. Nicole is highly knowledgeable in Supply Chain Management and Finance within a healthcare environment, including applications such as Accounts Payable, Procurement, Inventory, General Ledger, Asset Management, Payroll, Human Resources, and Benefits.

Nicole demonstrates a remarkable ability to work both autonomously and as a collaborative team player. She is easily adaptable to change and has a strong eagerness to learn and expand her capabilities in Infor products. Her primary focus is on Infor Security, where she excels in ensuring robust and compliant security setups.

Professional Summary:

- **Extensive Experience:** Over 30 years in software engineering, with a deep focus on analysis, design, programming, testing, security setup, data conversions, and implementations.
- **Lawson ERP Expertise:** More than 27 years of experience with Lawson ERP Applications versions 9 and 10, and Infor Landmark CloudSuite v11 FSM/HCM.
- **Healthcare Industry Knowledge:** In-depth understanding of Supply Chain Management and Finance within a healthcare environment, including key applications such as Accounts Payable, Procurement, Inventory, General Ledger, Asset Management, Payroll, Human Resources, and Benefits.
- **Adaptability and Learning:** Easily adaptable to change with a strong eagerness to learn and expand capabilities in Infor products.
- **Infor Security Focus:** Specializes in Infor Security, ensuring robust and compliant security setups.

Nicole's extensive experience and deep expertise make her an invaluable asset to any organization. Her ability to adapt, learn, and collaborate effectively ensures that she consistently delivers high-quality results, particularly in the complex and dynamic field of healthcare software engineering.

Relevant Skills

Programming Languages:

- **Landmark LPL:** Proficient in scripting and customization within the Infor Landmark environment.
- **COBOL:** Extensive experience in legacy system programming and maintenance.
- **PL/SQL:** Skilled in database programming and query optimization.
- **Unix Shell Script:** Expertise in automating tasks and managing Unix-based systems.
- **JavaScript:** Capable of developing interactive web applications and enhancing user interfaces.

Database Management:

- **MS SQL:** Proficient in database administration, query optimization, and data migration.
- **Oracle:** Experienced in managing Oracle databases, including performance tuning and backup strategies.
- **DB2:** Skilled in handling DB2 databases, ensuring data integrity and efficient access.
- **Informix:** Knowledgeable in Informix database management and optimization.

Applications and Tools:

- **Infor Landmark:** Expertise in implementing and managing Infor Landmark applications.
- **XI CloudSuite FSM/HCM:** Skilled in deploying and customizing CloudSuite Financials and Human Capital Management.
- **Landmark Security Administrator:** Proficient in configuring and managing security settings within Landmark.
- **Lawson ERP (9.0.1 and 10):** Extensive experience in implementing and supporting Lawson ERP systems.
- **Lawson Security Administrator:** Skilled in managing Lawson security configurations and policies.
- **ISS and Lawson Federated Systems:** Experienced in integrating and managing federated systems.
- **IPA (Infor Process Automation):** Proficient in automating business processes using IPA.
- **Infor Rich Client:** Skilled in using Infor Rich Client for application management and customization.
- **Lawson MS Add-Ins and Spreadsheet Designer for XI:** Expertise in enhancing Lawson functionality through add-ins and spreadsheet tools.
- **Lawson Design Studio:** Capable of designing and customizing Lawson applications.
- **ImageNow and Electronic Data Interchange (EDI):** Experienced in document management and EDI processes.
- **Crystal Reports and LBI (Lawson Business Intelligence):** Proficient in creating reports and dashboards for business insights.
- **Kinsey Security Reports:** Skilled in generating security reports for compliance and auditing.
- **MHC and MS SQL Management:** Experienced in managing document processes and SQL databases.
- **Workday and Fax Integrator:** Knowledgeable in integrating and managing Workday and fax solutions.
- **ISD (Infor Security Designer):** Proficient in designing and managing security configurations.

Operating Systems:

- **UNIX:** Extensive experience in managing Unix-based systems, including scripting and automation.
- **Windows:** Proficient in administering Windows environments, including server configurations and maintenance.

Lawson ERP Modules:

- **Procurement:** Expertise in managing procurement processes and systems.
- **Accounts Payable:** Skilled in automating and optimizing accounts payable workflows.
- **Inventory Control:** Proficient in managing inventory systems and ensuring accurate stock levels.
- **Warehouse Management:** Experienced in optimizing warehouse operations and logistics.
- **Purchase Order Management:** Skilled in handling purchase order processes and systems.
- **General Ledger:** Expertise in managing financial records and ensuring accurate reporting.
- **Asset Management:** Proficient in tracking and managing organizational assets.
- **Strategic Ledger:** Experienced in advanced financial reporting and analysis.
- **Human Resources and Benefits:** Skilled in managing HR processes and benefits administration.
- **Payroll:** Expertise in automating and managing payroll systems.
- **MSCM (Mobile Supply Chain Management):** Proficient in managing mobile supply chain operations.



Senior Infor Security Specialist Infor CloudSuite / Tech Specialist
Consultant: Nicole Sutti

Clients/Experiences

Cendien – Carrollton, TX

03/2017 - Present

Senior Infor/Lawson Implementation Consultant

Nicole has provided extensive managed services support to a diverse range of clients, including GNC, MV Transport, Iron Road, City of Concord, Bon Secours, Globe Life, and Guilford, for Lawson 10 and Infor XI. Her responsibilities have been comprehensive, covering various critical areas to ensure seamless operations and enhanced system performance.

Key Responsibilities:

- **Security Setup:** Implemented and managed robust security setups to protect client data and ensure compliance with industry standards.
- **Landmark Support:** Provided expert support for Infor Landmark, addressing issues and optimizing system performance.
- **GHR and Payroll Support:** Assisted clients with Global Human Resources (GHR) and payroll processes, ensuring accuracy and efficiency.
- **Accounts Receivable (AR) Support:** Managed AR processes, ensuring timely and accurate financial transactions.
- **Payroll Interfaces:** Developed and maintained payroll interfaces to streamline data flow and improve payroll processing.
- **Infor Process Automation (IPA):** Utilized IPA to automate workflows, enhancing operational efficiency.
- **Custom Specifications and Programs:** Created custom specifications and programs tailored to client needs, improving system functionality.
- **Crystal Reports:** Designed and generated Crystal Reports to provide clients with valuable insights and data analysis.
- **SQL Queries:** Developed and executed SQL queries to support data management and reporting needs.

Nicole's expertise in these areas has been instrumental in ensuring that her clients' systems operate smoothly and efficiently. Her ability to provide tailored solutions and her commitment to excellence make her an invaluable resource for any organization utilizing Lawson 10 and Infor XI.

Nonprofit Hospital (Tufts Medical Center, Boston, MA) – Lawson 10 Support:

- **Security Setup:** Implemented Process Level and GL Company restricted security in Lawson Security, ensuring compliance and data protection.
- **User Management:** Established new security classes and assigned them to new users, enhancing system security and user access control.
- **LBI Security:** Configured LBI security for new users, ensuring secure access to business intelligence tools.
- **Report Management:** Created and modified over 600 existing LBI Crystal reports to accommodate new hospitals, ensuring accurate and comprehensive reporting.
- **Financial Operations:** Ran monthly GL closing programs and scheduled monthly LBI reports, maintaining financial accuracy and timeliness.

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- **Account Setup:** Established new GL accounts for Finance, facilitating accurate financial tracking and reporting.
- **Report Creation:** Developed RW100 reports for Income Statements and Balance Sheets for Finance, providing essential financial insights.
- **Program Specifications:** Created specifications for new programs needed for additional hospitals, ensuring tailored solutions for expanding operations.
- **Training Documentation:** Developed training materials for Activity, General Ledger, and Asset Management, enhancing user proficiency.
- **AWS Migration:** Assisted with AWS migration, including testing LBI and Crystal Reports, ensuring a smooth transition to the cloud.

Nonprofit Hospital (Eastern Maine Hospital, ME) – Landmark Security for XI Implementation on CloudSuite:

- **Security Design:** Conducted security design sessions for Finance, Supply Chain, Payroll, and Global Human Resources, ensuring robust security frameworks.
- **Role Mapping:** Led role mapping review sessions, aligning roles with organizational needs and security requirements.
- **Custom Roles and Security Classes:** Developed custom roles and security classes based on client specifications for Lawson 10 and XI, enhancing system security and functionality.
- **User Setup:** Configured users in security for Production, Test, and Development environments for CRM and SIT sessions, ensuring proper access and security.
- **Payroll Security:** Established Lawson Security for V10 for Payroll, creating custom roles and security classes for Payroll and HR, ensuring secure and efficient payroll operations.

Nonprofit Hospital (Hoag Hospital, Newport Beach, CA) – Lawson 10 Implementation on the Cloud:

- **Security Administration:** Utilized LSA, ISS, and IFS for security administration, setting up security classes and rules, and migrating users from 9.0 to 10.0, ensuring secure and efficient system operations.
- **Role Evaluation:** Used Kinsey Reports to identify and evaluate roles and security classes, addressing separation of duties and inconsistencies.
- **IPA Flows and Scheduling:** Designed IPA flows and scheduling, optimizing process automation and efficiency.
- **Approval Levels:** Set up approval levels in Landmark based on specifications, ensuring proper authorization workflows.
- **Ad Hoc Reporting:** Created ad hoc reports using SQL and Crystal Reports, providing customized data insights.
- **Interface Creation:** Developed interfaces for Payroll and HR files, ensuring seamless data integration and processing.
- **Custom Program Development:** Conducted analysis and design for creating custom programs, paint screens, and custom reports, addressing specific issues and user needs.
- **Business Process Documentation:** Researched new business processes for Lawson, collaborating with HR, PR, AP, and Procurement, and documenting the new processes.
- **Ongoing Support:** Provided ongoing support for Lawson applications 9 and 10.0, MSCM, and handhelds, ensuring continuous system performance and user satisfaction.
- **Issue Resolution:** Researched and resolved issues related to data integrity or processing in Lawson, ensuring accurate and reliable system operations.
- **System Updates:** Installed Lawson CTPs and patches, maintaining system currency and performance.



Senior Infor Security Specialist Infor CloudSuite / Tech Specialist
Consultant: Nicole Sutti

CYBELE CYBER CONSULTING, LLC

Independent Contractor - Senior Infor/Lawson Consultant

Responsibilities:

Translink (Vancouver, BC, Canada):

- **Security Setup:** Collaborated with the client to configure security for Infor CloudSuites XII FSM. Customized roles, security classes, web pages, and list configurations based on Product Owner's preferences.
- **Technical Tools:** Utilized Configuration Console, IDM security setup, Security Administrator, and Admin Console.
- **Knowledge Transfer:** Conducted KT sessions with Product Owners and the Technical Team.
- **Documentation:** Created comprehensive "How To" documents for migrating security, creating custom roles and security classes, setting up IDM security, and creating Proxy roles for testing.

Hendrick Health (Abilene, TX):

- **General Support:** Provided extensive support for Lawson 10.0 across HR, Payroll, Supply Chain, and General Ledger.
- **Security and Customization:** Set up new security roles, developed custom specifications, and created custom COBOL programs for Finance, HR, and Payroll.
- **Data Management:** Managed uploads for Item Master, Item Locations, Vendor Items, and Vendor Agreements. Inactivated obsolete items.
- **Interface Creation:** Developed interfaces for Abbott Labs (Item Master, Requisitions, Receipts, PO References), Absence Soft (HR Employees, Employee Managers, Employee Contacts), Wex/Cobra, and Guidestone uploads.

Belmero (Denver, CO):

- **Supply Chain Management:** Partnered with Blue Bin to create IPA interfaces for their clients, facilitating Requisitions, Receiving, and Inventory Counts from Blue Bin to Lawson.

University of Nebraska Medicine (Omaha, NE):

- **General Support:** Provided Lawson 10.0 support during the upgrade to Workday and continued support post-Go-Live.
- **Data Archiving:** Managed the archiving of Lawson Database.
- **Report Creation:** Developed Crystal Reports for HR, PR, Finance, and Supply Chain departments for historical inquiries.

Northbay Healthcare (Fairfield, CA):

- **General Support:** Offered comprehensive support for Lawson 10.0 across HR, Payroll, Supply Chain, and General Ledger.
- **Security and Customization:** Set up security, implemented custom program changes, and managed data conversions during the transition to Oracle.



Senior Infor Security Specialist Infor CloudSuite / Tech Specialist
Consultant: Nicole Sutti

Baystate Healthcare (Springfield, MA):

- **Report Conversion:** Converted over 300 Crystal Reports and modified SQL from Oracle to MS SQL. Published and added these reports to Dashboards on the new LBI server.

Unity Point Health (Des Moines, IA):

- **Report Conversion:** Converted over 300 Crystal Reports, published, and added them to Dashboards on the new LBI server.

Signet Jewelers (Akron, OH):

- **General Support:** Provided Lawson 9.0 support during the upgrade to SAP, ensuring smooth transition and minimal disruption.

CVS Health/Coram CVS Specialty Infusions Services

02/2016 - 03/2017

Senior Advisor Software Engineer INF

Responsibilities:

- **Lawson Applications Support:** Provided ongoing support for Lawson 9.0 applications, including Procurement, Purchase Orders, Accounts Payable, Inventory Control, and General Ledger. Ensured seamless operations and addressed any issues promptly.
- **Technical and Functional Expertise:** Demonstrated both technical and functional expertise in the Lawson Applications Procurement Suite, including Supply Chain. This involved deep knowledge of system functionalities and their practical applications.
- **Custom Program Development:** Conducted thorough analysis and design to create custom programs and reports. Modified existing programs to address specific issues and meet user needs, ensuring tailored solutions.
- **Business Process Research:** Researched and documented new business processes for Lawson, particularly in Accounts Payable and Procurement. Worked closely with stakeholders to understand requirements and implement effective solutions.
- **Interface Creation:** Developed and modified custom interfaces to integrate Lawson with other applications, enhancing system interoperability and data flow.
- **Lawson LSA Upgrade:** Successfully implemented a Lawson LSA upgrade from LAUA for version 9.0, ensuring the system remained up-to-date and secure.
- **EDI Vendor Setup:** Set up new EDI vendors for processing 850, 855, and 810 transactions. Collaborated with vendors to ensure smooth integration and processing.
- **EDI Transaction Management:** Researched and resolved issues related to EDI inbound and outbound transaction failures. Communicated effectively with vendors to address and rectify problems.
- **Issue Resolution:** Investigated and resolved data and processing issues reported by users, ensuring system reliability and user satisfaction.
- **Month-End Procedures:** Conducted month-end closing activities, including closing Accounts Payable, Inventory Control, and Purchasing. Ran necessary reports to ensure accurate financial records.
- **SQL Data Extraction:** Utilized SQL to extract data for research, user reports, and resolving data-related issues. Provided accurate and timely information to support decision-making.

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Senior Infor Security Specialist Infor CloudSuite / Tech Specialist
Consultant: Nicole Sutti

- **PAR and SARS Reviews:** Participated in PAR (Post-Award Review) and SARS (System and Application Review) reviews, contributing to continuous improvement and compliance.
- **User Assistance:** Assisted users with login issues, security setup, daily reports, and printer problems. Ensured users had the support they needed to perform their tasks efficiently.
- **Lawson Microsoft Add-ins:** Created Microsoft Add-ins for mass data loads and updates based on client specifications, streamlining data management processes.
- **Team Collaboration:** Attended Lawson team meetings and submitted weekly status reports, ensuring effective communication and collaboration within the team.

Core Staff

04/2014 - 01/2016

Senior Application Engineer

- Continued supporting Lawson Applications for Coram CVS Specialty Infusion Services including Procurement, Purchasing Orders, Accounts Payable, Inventory Control and General Ledger for Lawson 9.0
- Facilitated the transition of Lawson Application over to CVS Health
- Created custom programs and custom reports for specific issues and users' needs
- Created custom interfaces for Lawson to other applications.
- Setting up new EDI vendors for 850, 855 and 810
- Troubleshooting issues in Lawson for various data processes
- Using SQL to extract data for research, user reports and data related issues
- Participated in PAR and SARS reviews

Dell

01/2012 - 04/2014

Enterprise Resource Planning Advisor

- Lawson lead for healthcare client Apria and Coram Infusion
- Conducted weekly meetings with the client's management to review status reports
- Conducted weekly meetings with co-workers and client to discuss issues and upcoming projects
- Provided Application support 24/7 for over 1000 end users for Lawson Supported General Ledger, Accounts Payable and Inventory Control, Asset Management and Requisitions for Lawson applications, technical and functional for Lawson version 9.0
- Created custom programs and modify existing according to specifications
- Worked with Lawson Add-ins and Excel for uploading and updating data
- Documented existing procedures and new developments
- Conducted analysis, design and implementation on new Lawson projects
- Set up of Document Express setup for check printing and 1099 processing
- Worked with Remedy request ticket system to work with open request tickets and close out existing tickets that have been resolved following SLA
- Received the Dell Champion Award 2014



Senior Infor Security Specialist Infor CloudSuite / Tech Specialist
Consultant: Nicole Sutti

CCI-Computer Consultants International
Senior Programmer/Analyst Consultant

10/2010 - 08/2011

- Worked on a contract for DARS (Department of Assistive Rehabilitative Services) for Rehab Works.
- Converted Cobol programs to Informix procedures. Setup scripts to automate the execution of the procedures.
- Created Informix database tables and indexes for the new procedures. Fine tuning indexes to make queries more efficient and less timely.
- Worked on a new conversion for DBS (Department of Blind Services) to integrate with Rehab Works.
- Documented and created diagrams for procedures and processes.

Seton Family of Hospitals
Lead Database Analyst

11/2003 - 06/2010

- Worked in Supply Chain Management Information Services (SCMIS) supporting supply chain users on Lawson
- Troubleshooted and tracked PO transactions, faxes, EDI transactions, AP purchase order/ invoice matching.
- Analysis and design for new programs and modifications for Lawson ERP 8, including user and program documentation, testing and implementation.
- Maintained and designed Oracle triggers. Created and updated Oracle tables and indexes.
- Created PL/SQL queries and scripts to update and create tables, extract data for uploading, reporting, analysis and data consistency checks. Exported data to Excel and Access for reporting, summarizing, created bar graphs and charts in Excel, and integrating data from different systems into an Access DB.
- Created usage reports on items, vendors spend, cost center spend, invoice totals, PO totals, sub account totals, EDI transactions counts and invoice match analysis.
- Worked with vendors to set up EDI transactions (850, 810, 856, 855), testing, and implementation to production. Monitored all EDI transactions on a daily basis.
- Created UNIX scripts to ftp and encrypt files, automated PL/SQL queries to send data to an external email address or a specific directory.
- Created and maintained several Access DB including the Early Warning System (EWS) which integrated weekly supply expenditures by cost center with budget and statistics data for comparison in order to create score cards for each hospital site.
- Worked with AP to gather information on their Invoice entry process in order to create Lawson Add-ins spreadsheets and templates to enable them to input data into a spreadsheet and upload to the Lawson system.
- Created customized portal screens for Lawson to link an invoice to a scanned image in ImageNow, which is a documentation scanning application, and automated the uploading of scanned invoices into Lawson through interfaces.
- Mass loaded data for inventory locations, pars, and templates
- Participated in finding ways to decrease supply costs using par analysis and usage reports to determine which items were obsolete and which items were overstocked.
- Worked with MHC for printing 1099 documents and Image Now for linking invoices with Lawson invoices

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Senior Infor Security Specialist Infor CloudSuite / Tech Specialist
Consultant: Nicole Sutti

IntegriSource Inc

08/2001 - 11/2003

Lawson Contract Programmer

- Worked as a contract programmer on miscellaneous Lawson ERP projects. Conducted analysis, design, enhancements and modifications to Lawson programs and new developments using COBOL on NT and UNIX client servers relating to pay to Bill, Activities, and Procurement.

Compuware Corporation

11/2000 - 07/2001

Senior Technical Consultant

- Conducted analysis, design, testing, implementation, enhancements and modifications to Lawson programs and new developments using COBOL on NT and UNIX client servers which included the areas of Payroll, General Ledger, Accounts Receivables, Inventory Control, Account Payable and Human Resources.
- Designed UNIX scripts to automate processing.

Spectrum Software Services (S3G)/ DPRC Inc.

11/1996 - 05/1999

Senior Technical Consultant

- Responsibilities included enhancements, modifications, documentation and new developments using COBOL for Lawson Software Applications on the NT and UNIX client server which included the areas of Payroll, General Ledger, Accounts Receivables, Inventory Control, Accounts Payable and Human Resources.
- Assisted clients with data conversions which included analysis, design and creation of new programs, and testing in preparation for the year 2000.
- Managed as project leader for multiple concurrent projects for clients such as Borders, Sutter Healthcare, Diamond Shamrock, Union Camp, Bassett Healthcare, ILC Data Device, Binney and Smith and Penn Traffic.

Education

Southwest Texas State University, San Marcos, Texas

BBA, Major in Computer Information Systems, May 1989

Austin Community College, Austin, Texas

University of Texas, Austin, Texas

Major in Computer Science

Awards

Dell Champion Award 2014

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Senior Infor CloudSuite Payroll & HCM Consultant
Consultant: Joanne DeLorenzo

Professional Summary

Joanne is a results-driven **Senior Infor CloudSuite HCM Functional Consultant** with a passion for strategic thinking and a commitment to collaboration. She excels at streamlining company processes and has a proven track record of establishing and executing processes, procedures, and policies that increase compliance and productivity. Joanne offers exemplary planning, project management, and communication talents, making her an invaluable asset to any organization.

- **Organized and Goal-Oriented:** With 17 years of experience in human resources and payroll, Joanne is adept at managing complex projects and achieving organizational goals.
- **Excellent Communication Skills:** Possesses outstanding verbal and written communication skills, enabling her to effectively convey information and collaborate with diverse teams.
- **Innovative Training Methods:** Familiar with various training methods, including e-learning, to enhance employee development and knowledge retention.
- **Exceptional Presentation and Time Management:** Demonstrates exceptional presentation skills and excels at managing time efficiently to meet project deadlines.
- **Analytical Problem-Solver:** An analytical problem-solver who can anticipate issues and develop methods to streamline operations and improve efficiency.
- **Client and Team Rapport:** Skilled in building excellent rapport with clients and team members, fostering a collaborative and productive work environment.

Joanne's extensive experience and strategic mindset make her a standout professional in the field of human resources and payroll. Her ability to implement effective processes and her dedication to continuous improvement ensure that she consistently delivers high-quality results. Whether managing a complex project or developing innovative training programs, Joanne's skills and expertise drive success and enhance organizational performance.

Relevant Skills

- **Infor CloudSuite HCM Expertise:** Proficient in Infor CloudSuite HCM Payroll and Global Human Resources (GHR), ensuring seamless payroll and HR operations.
- **Lawson Payroll and Kronos:** Extensive experience with Lawson Payroll and Kronos, optimizing payroll processes and workforce management.
- **Advanced Tools Proficiency:** Skilled in using Infor Spreadsheet Designer (ISD), Lawson Microsoft Add-Ins, Camtasia, Crystal Reports, and Report Writer to enhance data management and reporting capabilities.
- **Virtual Collaboration Tools:** Experienced with Zoom, Microsoft Teams, Microsoft Office, GoTo Meeting, facilitating effective virtual collaboration and communication.
- **Creative and Technical Software:** Proficient in Adobe Photoshop and Adobe Captivate, combining creative design with technical training solutions.
- **HR and Payroll Systems:** Knowledgeable in Ultimate Software and systems troubleshooting, ensuring smooth HR and payroll system operations.
- **Ongoing Professional Development:** Completed coursework in Infor HR Talent: HR Payroll Foundation (March 2023) and currently pursuing coursework in Infor Global HR: Configuring and Administering Benefits.



Senior Infor CloudSuite Payroll & HCM Consultant
Consultant: Joanne DeLorenzo

- **Microsoft Access Certification:** Holds certificates in Introduction to Microsoft Access and Microsoft Access Intermediate courses, enhancing database management skills.

Clients/Experiences

Cendien – Carrollton, TX

10/2019 - Present

Senior Infor HCM / GHR Consultant

Joanne works extensively with a diverse range of clients, providing expert **functional support and troubleshooting** for **Infor Lawson Payroll, Infor GHR, and Kronos**. Her role involved addressing a wide array of issues, including those related to GHR, Lawson, Kronos, and system migrations. She assisted client teams with her functional expertise and provided guidance on resolving functional issues effectively.

Joanne's ability to diagnose and **resolve complex functional issues** has been instrumental in ensuring smooth operations and successful system integrations for her clients. Her deep understanding of these systems allows her to provide **tailored solutions** that meet the specific needs of each organization. Whether dealing with payroll processing challenges, **system migrations, or integration issues**, Joanne's expertise ensures that her clients achieve optimal system performance and efficiency.

Key Contributions:

- **Functional Support:** Provided expert functional support for Infor Lawson Payroll, Infor GHR, and Kronos, addressing a wide range of issues.
- **Troubleshooting:** Diagnosed and resolved complex functional issues, ensuring smooth operations and system performance.
- **System Migrations:** Assisted with system migrations, ensuring seamless transitions and minimal disruption to business processes.
- **Client Guidance:** Offered guidance to client teams on resolving functional issues, enhancing their ability to manage and optimize their systems.

Responsibilities:

- **Client Collaboration:** Worked closely with business users to configure system components, translating business requirements into functional design specifications. Defined initial settings and reporting options to ensure systems met client needs.
- **Ongoing System Support:** Provided continuous ERP and Time and Attendance functional system support. Communicated and interacted with technical teams and clients to resolve functional issues, ensuring client requirements were met.
- **Process and Reporting Analysis:** Gained a deep understanding of processes, reporting requirements, and client interfaces impacted by the ERP system. Identified necessary modifications and recommended and applied changes as appropriate.
- **Business Requirements Gathering:** Gathered and analyzed business requirements and processes. Understood client needs and the functionality of ERP components, defining and documenting business requirements and validating solutions with clients.

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Senior Infor CloudSuite Payroll & HCM Consultant
Consultant: Joanne DeLorenzo

- **Problem Solving:** Utilized strong problem-solving skills to identify, analyze, and assist in resolving business application problems within an ERP environment. Ensured issues were addressed promptly and effectively, minimizing disruption to client operations.

Dream Center Education Holdings – Pittsburgh, PA
Human Resources System Analyst II

11/2017 – 10/2019

Joanne led the HRIS team to ensure the optimal performance, maintenance, upgrades, data integrity, and support of the ERP system – Infor Lawson. She coordinated with various functional areas to resolve data and system issues related to HR, Payroll, Benefits, and external vendors. Joanne identified the impacts of system changes or issues on any functional area supported by Lawson, communicated these impacts effectively, assisted in establishing priorities, and ensured that all changes or fixes were successfully migrated to production. She managed small to medium-sized projects and provided comprehensive project oversight from design through implementation.

Responsibilities:

- **Kronos System Support:** Assisted in the maintenance, upgrades, and data integrity review of the Kronos system. Provided secondary support for daily matters related to accrual profiles, scheduler, and employee profiles, ensuring smooth and efficient operations.
- **Garnishment Outsourcing Project:** Led a project with a third-party vendor to outsource garnishments through interfaces with Lawson and SFTP file transmissions. This project was critical for ensuring seamless and secure data exchanges between HR Payroll systems.
- **Report and Query Management:** Utilized Microsoft Excel Add-Ins, Microsoft Access, and Crystal Reports to write, maintain, and support a variety of reports and queries for functional areas. This ensured accurate and timely information was available for decision-making.
- **Technical Documentation:** Researched, updated, and maintained technical requirement documentation for software and systems used by the HR Department and Payroll, including BSI, MHC, and Infor Training. This documentation was essential for maintaining system integrity and compliance.
- **Mass Data Uploads:** Prepared, formatted, and imported mass uploads of personnel data from multiple functional areas into the appropriate system. This streamlined data management processes and ensured data accuracy.
- **Integration Support:** Supported internal and external integrations for software and systems, including design, testing, and troubleshooting. This ensured seamless interoperability and functionality across various platforms.

Education Management Corporation – Pittsburgh, PA
Infor Lawson Payroll Compliance Specialist

07/2010 - 08/2017

Joanne has demonstrated exceptional expertise in processing the company's bi-weekly multi-state payroll using Infor Lawson, including managing the time-management interface and garnishment file. She utilized both Excel Add-ins and Access Database reports to ensure accurate payroll processing for each pay period, along with creating on-demand reports as needed.

Key Achievements:

- **Electronic Income Withholding Support Orders Implementation:** Successfully led the implementation of Electronic Income Withholding Support Orders. This involved gathering requirements, configuring the system,

creating test cases, and conducting thorough testing to ensure accurate program configuration. Joanne collaborated effectively across multiple departments to ensure a smooth transition to production.

- **Infor Lawson Payroll Testing:** Served as the lead Infor Lawson Payroll Tester for all implementations and upgrades to the Human Resources systems, including updates to the Kronos WTK system. This role involved managing platform changes and ensuring seamless integration and functionality.
- **Training and Support Videos:** Developed and maintained 15 short training videos using self-taught Camtasia skills. These videos provided end users of Kronos WTK with the necessary support to learn the new system, showcasing Joanne's creativity and innovation. Her efforts were recognized with two On-the-Spot Awards for implementation excellence.
- **Leadership and Mentorship:** Demonstrated strong leadership by mentoring new hires and working with existing staff on professional development. Joanne played a key role in delivering and improving internal training programs, enhancing team capabilities.
- **SharePoint Site Enhancement:** Restructured and reformatted the payroll department's Microsoft SharePoint site using HTML knowledge. She added seven new pages of easily accessible information, enabling employees to efficiently access important payroll information. Joanne continues to update the site with new information to maintain its relevance and usefulness.

Education Management Corporation – Pittsburgh, PA

06/2009 - 07/2010

Infor Payroll Administrator / Specialist

While interacting closely and effectively with all levels of the organization, Joanne processed a portion of the company's multi-state payroll using Infor Lawson for over 4,200 employees on a bi-weekly basis. Her role required meticulous attention to detail and strong communication skills to ensure accurate and timely payroll processing.

Key Achievements:

- **Kronos WTK Implementation Support:** Joanne played a crucial role in supporting the configuration and system use for the Kronos WTK implementation. She collaborated closely with subject matter experts to create queries and design PTO accrual profiles, ensuring the system met the organization's needs.
- **Advanced Tax Project Participation:** Volunteered as one of three advanced team members to work on a complex tax project. Joanne discovered a significant error within the payroll system related to employees' tax withholdings. Her keen eye for detail enabled the company to mitigate potential penalties and interest. She effectively presented and communicated the errors to affected employees, ensuring they thoroughly understood the issue and its resolution.

Eat N Park Hospitality Group

12/2008 - 06/2009

Senior Payroll Specialist

- **Salaried Payroll Management:** Joanne was responsible for the comprehensive management and processing of the company's salaried payroll for 1,500 employees on a bi-weekly basis. Her meticulous attention to detail ensured accurate and timely payroll processing, contributing to employee satisfaction and operational efficiency.
- **Ulti-Pro System Implementation:** Collaborated closely with the HR Systems Manager as the Payroll Lead for the implementation of the Ulti-Pro system. Joanne played a pivotal role as the core functionality tester,



Senior Infor CloudSuite Payroll & HCM Consultant
Consultant: Joanne DeLorenzo

ensuring that the system met all payroll requirements and operated seamlessly. Her expertise and leadership were instrumental in the successful deployment and integration of the new payroll system.

Education Management Corporation OHE
Payroll Coordinator

09/2007 - 11/2008

Joanne played a crucial role in managing payroll processing for 2,500 employees on a bi-weekly basis. She ensured accuracy and compliance with all relevant regulations while streamlining workflows to enhance efficiency. Her meticulous attention to detail and strategic approach significantly improved the payroll process, reducing errors and ensuring timely payments.

Key Responsibilities:

- **Analyzed and optimized payroll systems** and business processes to facilitate a smooth transition to **ADP eTIME**, guiding employees through the change and ensuring minimal disruption. Led the development and delivery of comprehensive training programs for all end-users, ensuring full adoption and proficiency in the new system.
- **Delivered weekly onboarding presentations** to new hires, providing critical payroll information and explaining the payroll process to ensure employees were set up for accurate and timely payments.
- **Spearheaded the implementation of an automated electronic upload** for 1,500 teachers' payment schedules, reducing manual data entry time by **96%**. This initiative significantly minimized the risk of data entry errors, eliminated overpayments, and enhanced the payroll process's efficiency, ensuring strict adherence to deadlines.
- **Cultivated strong working relationships** with key stakeholders across various departments, as well as upper management, fostering collaboration and improving interdepartmental communication. This helped streamline payroll operations and resolve issues quickly, contributing to a more efficient and effective payroll process.

Education

BA – Cultural Anthropology, Sociology Minor

- College of Arts and Sciences, University of Pittsburgh, 2007
- Certificate in Introduction to Microsoft Access and Microsoft Access Intermediate courses through Community College of Allegheny County.
- Member of WIN-PITT; a women's investment club
- Enjoyed volunteering as a Y-buddy for Collegiate YMCA. Participated in a 4-week assignment with International Student Volunteers in Australia to support The Crossing, a conservation group.
- Completed extensive coursework with the Emerging Leaders Program and the Senior Leadership Seminar



Senior Infor Functional HCM Consultant
Consultant: Sharon Jordan

Professional Summary

A highly accomplished and results-driven **Infor CloudSuite GHR/Payroll Functional Consultant**, Sharon brings over 30 years of experience in the human resources and payroll domains. She is passionate about optimizing company processes and leveraging technology to drive business transformation. With a broad range of expertise, Sharon has served in diverse **leadership** roles such as **Senior Business Consultant**, Product Marketing Director, and HR Implementation Manager for Infor Lawson. She is recognized for her ability to provide strategic solutions that streamline operations, improve efficiency, and foster collaboration across functional teams.

Throughout her career, Sharon has gained a reputation for **anticipating challenges, creating effective solutions**, and managing complex implementations with precision. Her experience spans multiple industries and includes a deep understanding of business requirements and the functional intricacies of various HR and payroll systems. Known for her strong communication skills, she excels at working with both clients and internal teams to translate business needs into technical solutions and ensure successful project delivery.

Key Highlights:

- **30+ years of expertise** in human resources and payroll management, with a focus on ERP solutions.
- **Proficient in providing consultative guidance** on Infor Lawson Payroll, Infor Landmark GHR, and other HRIS technologies.
- **Analytical problem-solver**, skilled at troubleshooting issues and implementing strategies that reduce operational costs and enhance process efficiencies.
- **Adept at building strong relationships** with clients, vendors, and cross-functional teams, ensuring successful project outcomes and long-term partnerships.

Sharon's extensive experience and proven track record make her an asset to any organization looking to enhance their HR and payroll processes through innovative technology solutions. Her ability to navigate complex projects and deliver results that align with business goals sets her apart as a leader in her field.

Relevant Skills

- **Infor Lawson Payroll & Infor Landmark GHR**
Extensive experience with the **Infor Lawson Payroll** suite and **Infor Landmark GHR**, from **system configuration and implementation** to **ongoing support and optimization**. Proficient in configuring and customizing HRIS systems to align with client-specific business processes, ensuring **data accuracy, efficiency, and regulatory compliance**. Skilled in **data migration, system integration, and troubleshooting**, ensuring seamless transitions between systems and continuous, uninterrupted operations.
- **ERP Implementation & Support**
In-depth knowledge of **Enterprise Resource Planning (ERP)** systems, with a focus on **HR, payroll, and time and attendance** modules. Proven success in **end-to-end implementation**, from gathering **business requirements** and **designing solutions** to **testing, training, and post-go-live support**. Adept at managing all phases of the implementation life cycle, ensuring that projects are delivered on time, within scope, and in

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accordance with budget. Extensive experience working with **cross-functional teams** to ensure integration with other enterprise systems.

- **Functional Consulting & Business Process Analysis**

Highly skilled in conducting **business process analysis** to assess current workflows and recommend solutions that enhance efficiency and effectiveness. Expert at **translating business requirements** into functional specifications and configuring systems accordingly. Known for identifying process bottlenecks and implementing improvements that drive **cost savings, productivity gains, and operational improvements**. Adept at **troubleshooting** functional issues and providing clients with practical, sustainable solutions.

- **Payroll & Time Management Systems**

Expert in the implementation and support of **payroll and time management** systems such as **Kronos, ADP eTIME**, and others, with a strong emphasis on accurate **time tracking, payroll processing, and compliance**. Well-versed in the nuances of **overtime calculations, leave management, taxation, and reporting requirements**. Experienced in **data entry optimization**, having led initiatives that significantly reduced manual payroll input time, errors, and **overpayment issues**.

- **Project Management & Leadership**

Proven ability to lead and manage projects of various scales, from small enhancements to large, multi-phase ERP implementations. Skilled in **project planning, resource allocation, and timeline management**, ensuring that all deliverables are completed on time and to specification. Strong **leadership and team management** skills, with a track record of successfully guiding **cross-functional teams** through complex system deployments. Expertise in **risk management, scope control, and issue resolution**, ensuring that potential challenges are proactively addressed to avoid project delays.

- **Training Development & End-User Training**

Experienced in developing and delivering **training programs** tailored to end-users, both for new system implementations and ongoing support. Capable of breaking down complex technical processes into understandable, actionable steps for **non-technical users**. Conducts **onboarding and hands-on workshops**, ensuring that users have the knowledge and confidence to fully utilize HRIS systems. Committed to fostering a **learning culture**, ensuring that clients are equipped with the tools and skills necessary to independently manage their systems.

- **System Integration & Process Optimization**

Skilled in **integrating HRIS solutions** with other enterprise systems, ensuring that data flows seamlessly across platforms and eliminating silos of information. Proficient in identifying opportunities for process automation and implementing **workflow optimizations** that increase productivity while reducing manual errors. Experienced in overseeing **system upgrades**, ensuring smooth transitions while maintaining system integrity and functionality.

- **Data Migration & System Troubleshooting**

Adept at managing **data migration** projects, ensuring that client data is accurately transferred between systems with minimal disruption to operations. Skilled in **data mapping, data validation, and error checking** to ensure that all data remains intact and accurate. Excellent problem-solving skills, particularly in identifying, diagnosing, and resolving complex issues within ERP and HRIS systems, whether related to data integrity, configuration, or integration with other software platforms.

- **Client Relations & Stakeholder Management**

Exceptional at building and maintaining strong, long-lasting relationships with clients, vendors, and internal

stakeholders. Known for delivering outstanding **client service** by providing clear, transparent communication and acting as a trusted advisor on all matters related to **HRIS solutions**. Skilled at identifying client needs, setting realistic expectations, and ensuring that all project goals are met. Committed to ensuring that clients are consistently satisfied with the solutions provided and the results achieved.

- **Industry Knowledge & Regulatory Compliance**

Deep understanding of **industry regulations** and **compliance standards**, including **FLSA**, **IRS regulations**, **EEOC requirements**, and **ACA compliance**. Ensures that all payroll and HR systems adhere to local, state, and federal guidelines, and helps clients navigate the complexities of regulatory requirements. Regularly updates clients on **industry trends**, **best practices**, and legal changes to ensure that their systems remain compliant and effective.

Clients/Experiences

Cendien – Carrollton, TX

2019 – Present

Senior Infor HCM / GHR Consultant

Sharon has played a pivotal role in the success of several high-profile client projects, including those for GNC, Guilford, and MV Transit. In these projects, she has worked extensively as a functional support expert and troubleshooting resource for **Infor Lawson Payroll**, **Landmark GHR**, and **Kronos v8 systems**. Her deep expertise in these areas has been instrumental in helping organizations overcome a variety of challenges.

For GNC, Sharon's contributions included resolving complex system integration issues, ensuring that disparate systems worked seamlessly together. At Guilford, she focused on optimizing payroll processing, implementing strategies that enhanced accuracy and efficiency. For MV Transit, Sharon managed the migration to new systems, ensuring a smooth transition with minimal disruption to operations.

Her ability to diagnose and address issues quickly has been crucial in maintaining optimal system performance for these clients. Sharon's work has not only resolved immediate problems but also laid the groundwork for long-term improvements, enabling these organizations to operate more effectively and efficiently.

Key Contributions:

- **System Integration:** Successfully integrated various systems to ensure seamless operation and data flow.
- **Payroll Processing Optimization:** Implemented strategies to enhance the accuracy and efficiency of payroll processes.
- **System Migration:** Managed the transition to new systems, ensuring minimal disruption and optimal performance.
- **Troubleshooting Expertise:** Quickly diagnosed and resolved issues, maintaining high system performance.

Sharon's extensive experience and problem-solving skills make her an invaluable asset to any organization looking to enhance their HR and payroll systems. Her ability to deliver tailored solutions that meet specific business needs sets her apart as a leader in her field.

Responsibilities:

- **ERP Module Configuration:** Partnered with business users to configure ERP modules, translating business requirements into clear and actionable functional design specifications. Managed initial settings, reporting options, and system configurations to meet specific business needs.
- **Continuous Functional Support:** Provided ongoing functional system support for HR, payroll, and time and attendance systems, collaborating with technical teams to resolve issues and ensure system stability.
- **Data Migration Initiatives:** Led data migration projects and implemented modifications to the ERP system, assessing business requirements and adjusting the system's functionality to meet client needs.
- **Business Requirements Analysis:** Analyzed and gathered business requirements, ensuring that all system changes aligned with the client's processes and goals. Validated solutions with clients and provided recommendations for improvements as necessary.
- **Client and Technical Liaison:** Acted as the primary liaison between clients and technical teams, ensuring data integrity and system compatibility across various functional areas such as HR, Payroll, Benefits, and external vendors.
- **Project Management:** Managed small to medium-sized projects, overseeing project life cycles from design through to implementation, ensuring timely and successful project completion.

Sharon's comprehensive skill set and dedication to excellence make her a standout professional in the field of HR and payroll systems. Her contributions have consistently driven successful outcomes and long-term improvements for her clients.

Kinsey and Kinsey – Glen Ellyn, IL

2003 – 2019

Senior Infor Lawson HR Functional Consultant

At Kinsey and Kinsey, Sharon played a pivotal role in providing **Infor Lawson HCM and Infor GHR implementation** support to various clients, particularly in the education sector (K-12 school districts). Their in-depth knowledge of the HR and Payroll modules allowed them to successfully implement comprehensive HRIS systems, contributing to successful, on-time project deliveries and helping clients achieve operational excellence.

Responsibilities:

- Provided comprehensive implementation support for **Infor Lawson Human Capital Management (HCM)** and **Infor GHR** modules, ensuring all system requirements were met and business processes were seamlessly integrated.
- Led the documentation and analysis of business requirements, developing detailed plans for system configuration, implementation, and testing.
- Managed **end-to-end HRIS implementations, including design, testing, go-live, and post-implementation audits**. Ensured the system was fully operational and met all client specifications.
- Delivered training programs to end-users, ensuring they were equipped with the knowledge necessary to effectively utilize the new systems.
- Stayed abreast of industry trends and legal requirements, incorporating updates into client solutions to ensure compliance and system optimization.
- Successfully led the implementation of **Infor GHR HCM Suite (V11)**, ensuring all aspects of the system were configured and deployed effectively.



Senior Infor Functional HCM Consultant
Consultant: Sharon Jordan

eMac Digital – Oakbrook, IL

10/2002 - 10/2003

Senior Project Manager, Restaurant Business Services

Sharon managed the implementation of the Lawson HRIS system in the foodservices industry, overseeing the project from initiation through to successful deployment. Her strategic insight into the needs of the restaurant business allowed her to deliver tailored solutions that streamlined HR processes and supported operational goals.

Responsibilities:

- **Project Management:** Managed all phases of Lawson HRIS system implementation, from planning and design through to testing and rollout. Coordinated resources, managed timelines, and ensured that all deliverables met quality standards.
- **Subject Matter Expertise:** Acted as the subject matter expert for HR processes, providing guidance on designing a reusable HRIS system tailored to the unique needs of the foodservice industry.
- **Team Leadership:** Led a team of ten full-time resources, ensuring all tasks were completed on time and within budget.
- **Customer Implementation:** Oversaw the first customer implementation of the Lawson HRIS system in a service bureau environment, ensuring a smooth transition and user adoption.

Sharon's ability to manage complex projects and her deep understanding of HR processes have been key to her success in delivering effective and efficient solutions for the foodservices industry. Her leadership and expertise have ensured that the HRIS system met the specific needs of the business, resulting in streamlined operations and enhanced performance.

Infor Lawson – St. Paul, MN

Senior Business Consultant

02/2001 - 10/2002

At a global enterprise software solutions provider, Sharon took on several key responsibilities that significantly contributed to the company's success:

Responsibilities:

- **Sales Presentations and Product Demonstrations:** Prepared and presented compelling sales presentations and scripted product demonstrations, focusing on the Lawson e-Recruiting Service and Human Resources product suites.
- **Rebranding and Realignment:** In line with corporate realignment, re-branded, repositioned, and updated all e-Recruiting materials to reflect the e-Recruiting service as an integral component of the total Lawson Human Resources solution.
- **Business Integration:** Successfully integrated the e-Recruiting business unit into the broader Lawson HR product line, positioning the Lawson HR Suite as a comprehensive 360° Human Resources Solution. This strategic move resulted in the sale of 27 units in a single sales quarter.
- **Training Program Management:** Managed the training program for HR Business Consultants, ensuring they were well-versed in the e-Recruiting application and could effectively support clients.

Sharon's strategic vision and execution in these areas not only enhanced the company's product offerings but also drove significant sales growth and improved client satisfaction. Her ability to align product positioning with corporate goals and train internal teams underscores her leadership and expertise in the HR software domain.

**Product Marketing Director,
e-Recruiting Business Unit**

03/1999 - 02/2001

Sharon's strategic direction and innovative marketing approaches significantly contributed to the successful launch and growth of the e-recruiting service, showcasing her ability to drive business results and enhance product visibility in the market.

Responsibilities:

- **Marketing Leadership:** Directed all business unit marketing activities related to the launch of a new Web-based e-recruiting service purchased by Lawson in March 1999. This included overseeing marketing, product management, and marketing communications.
- **Lead Generation:** Increased lead generation by over 300% within a three-month period through targeted marketing strategies and effective campaign execution.
- **Product Releases:** Successfully managed two major product releases within a six-month period, ensuring timely delivery and market readiness.
- **Subscription Growth:** Achieved a remarkable increase in subscriptions by over 1000%, maintaining a 75% retention rate, demonstrating the effectiveness of the marketing strategies and the value of the product to customers.

HR Implementation Manager

04/1997 - 03/1999

Sharon's meticulous approach to project management and her ability to effectively communicate and manage resources have been key to her success in delivering high-quality software implementations. Her expertise ensures that projects run smoothly and achieve their intended outcomes

Responsibilities:

- **Project Planning and Monitoring:** Created and monitored client software implementation project plans, ensuring all tasks were clearly defined and tracked.
- **Resource Management:** Identified and scheduled project resources, ensuring the right people were in place to meet project goals.
- **Scope and Bottleneck Management:** Monitored projects to limit scope creep and identify/correct project bottlenecks, maintaining project timelines and quality.
- **Status Communication:** Communicated project status to all parties involved, including the executive sponsor, ensuring transparency and alignment.
- **Subject Matter Expertise:** Provided expert knowledge to guide implementation decisions, ensuring best practices were followed.
- **Successful Implementations:** Led multiple successful client implementation projects, delivering on time and within budget.



Senior Infor Functional HCM Consultant
Consultant: Sharon Jordan

Cyborg Systems, Inc. – Chicago, IL
HR Payroll Developer

Sharon's tenure at Cyborg Systems, Inc. highlights her ability to manage complex projects, lead teams, and drive sales success. Her roles spanned from strategic management to hands-on client services, showcasing her versatility and commitment to excellence in the payroll and human resources software industry.

Product Strategy Manager (11/1994 - 04/1996)

- Managed all phases of development projects, including defining business requirements, system design, testing, and rollout within ISO 9004 standards.
- Negotiated strategic partnerships to develop workflow capabilities within the Cyborg product line.

Manager of Client Services (10/1992 - 11/1994)

- Managed a team of sales support Account Managers.
- Led a project team responsible for developing the product demo environment.
- Developed an RFP response department for the company.
- Consistently exceeded sales goals as a team by 110%.

Senior Account Manager (07/1986 - 10/1992)

- Provided sales presentations and product demonstrations, including scripted demos.
- Created and monitored client software implementation project plans.
- Provided subject matter expert knowledge to guide implementation decisions.
- Trained customers in classroom and one-on-one situations.
- Consistently exceeded sales goals.
- Successfully managed 50 client implementation projects.

Education

BS - Business Administration with a major in Personnel Management

- Eastern Illinois University- Charleston, IL



Senior Infor CloudSuite Functional HCM Consultant
Consultant: Randika Wijesena

Professional Summary

Randika is an exceptionally skilled and dedicated **Infor CloudSuite HCM/ERP Functional Consultant** with over a decade of experience in delivering comprehensive solution implementations and post-go-live support. His expertise spans a wide array of industries, including fashion, healthcare, manufacturing, insurance, and media. With a profound understanding of **both functional and technical consulting**, Randika excels at transforming complex business requirements into actionable system solutions that enhance operational efficiency and optimize processes.

He thrives in dynamic environments, adeptly **managing client relationships** and consistently delivering results while navigating intricate project challenges. His proficiency encompasses a broad spectrum of **Infor HCM, Payroll, GHR, Talent Management**, and Infor M3 implementations. Randika is highly skilled in customizing HR solutions to meet organizational needs, ensuring seamless system transitions, and providing ongoing support to maximize system performance and business processes.

Renowned for his **analytical problem-solving abilities**, Randika has a proven track record of identifying potential issues before they arise, implementing effective solutions, and streamlining operations. His contributions significantly enhance the overall success of his clients' HR and ERP systems, making him an invaluable asset in any project he undertakes.

Skillsets Summary

- **Business Analysis & Requirements Gathering:** Skilled in gathering, analyzing, and documenting business requirements, facilitating workshops, and creating actionable system configurations.
- **Streamlining Business Processes:** Expertise in business process reengineering, optimizing workflows, and automating tasks to increase efficiency and reduce costs.
- **System Configuration & Customization:** Hands-on experience with configuring and customizing ERP and HCM systems, including Infor Global HR, Talent Management, and Infor M3.
- **Prototyping & Testing:** Proficient in creating prototypes and conducting unit, integration, and user acceptance testing.
- **Infor M3:** Experienced in implementing and supporting various versions of Infor M3, particularly in manufacturing, planning, and supply chain management.
- **Infor Talent Management & GHR Suite:** Expertise in configuring and supporting modules like Goal Management, Performance Management, Talent Acquisition, and Learning & Development.
- **Microsoft SQL & Reporting:** Skilled in database management, report designing, and troubleshooting using Microsoft SQL and creating custom reports with SSRS and Crystal Reports.
- **Workflow Configuration with Infor Process Automation (IPA):** Proficient in developing and configuring automated workflows to streamline HR processes.
- **Data Migration & Upload:** Experienced in managing data migration using Infor Spreadsheet Designer, ensuring data integrity and minimal disruption.

Responsibilities Summary

- **Issue Resolution and Post-Go-Live Support:** Addressing and resolving complex issue tickets to ensure efficient system operation post-implementation.
- **Workflow Development & Automation:** Designing and implementing automated workflows to streamline HR processes.
- **Goal & Performance Management Implementation:** Leading the implementation of Goal & Performance Management modules and training users.
- **Training and Change Management:** Conducting training sessions for end-users and stakeholders to build internal capability and ensure long-term system success.

Skillset and Responsibility Highlights

- **Business Analysis & Requirements Gathering**
A proficient business analyst skilled in gathering, analyzing, and documenting business requirements from stakeholders to create functional designs that meet client needs. She is experienced in facilitating requirements workshops, creating business process documentation, and transforming complex requirements into clear, actionable system configurations and technical specifications.
- **Streamlining Business Processes**
Expertise in **business process reengineering** and the ability to streamline operations by eliminating redundancies and automating manual tasks. She is adept at using ERP and HR systems to optimize workflows, resulting in increased efficiency, reduced costs, and improved system performance.
- **System Configuration & Customization**
Hands-on experience configuring and customizing complex ERP and HCM systems, including **Infor Global HR (GHR)**, **Infor Talent Management**, **Infor M3**, and other modules. She is skilled at system setup, prototyping, and testing, ensuring that system configurations align with the client's business processes and requirements.
- **Prototyping & Testing**
Expertise in creating functional prototypes and conducting rigorous system testing, including unit testing, integration testing, and user acceptance testing (UAT). She ensures that the systems are configured properly, perform as expected, and meet business objectives.
- **Infor M3 (Versions 10.1, 13.3, 13.4)**
Highly experienced in implementing and supporting **Infor M3** across various versions, particularly versions 10.1, 13.3, and 13.4. She has a comprehensive understanding of the M3 modules related to **manufacturing, planning, and supply chain management**, enabling her to deliver tailored solutions that meet specific business needs.
- **Infor Talent Management & GHR Suite**
Expertise in implementing **Infor Talent Management (ITM)** and **Infor GHR**. This includes configuring and supporting modules such as **Goal Management, Performance Management, Talent Acquisition, and Learning & Development**. She has worked on multiple successful **Talent Management** deployments, ensuring seamless integration with other HRIS solutions.
- **Microsoft SQL & Reporting**
Highly skilled in using **Microsoft SQL** (2005 and above) for database management, report designing, and



Senior Infor CloudSuite Functional HCM Consultant
Consultant: Randika Wijesena

troubleshooting. Experienced in creating custom reports using **SSRS (SQL Server Reporting Services)** and **Crystal Reports**, providing actionable insights to HR, payroll, and business operations teams.

- **Workflow Configuration with Infor Process Automation (IPA)**
Proficient in developing and configuring workflows using **Infor Process Automation (IPA)**, ensuring that business processes are automated, efficient, and aligned with the client's objectives. She has experience designing workflows for **employee onboarding**, **performance evaluations**, and other HR processes, minimizing manual intervention and errors.
- **Data Migration & Upload**
Strong experience in **data migration**, particularly using **Infor Spreadsheet Designer**. She has successfully managed the migration of employee data, payroll details, and other key HR information from legacy systems to Infor-based platforms, ensuring data integrity and minimal disruption.

Training & Certifications

- **Certified in Infor Global HR, Talent Acquisition, and Goal & Performance Management Modules:** Randika holds certifications in these key Infor modules, demonstrating his expertise in managing and optimizing HR processes, talent acquisition, and performance management.
- **Trained in Infor Process Automation (IPA):** He has received specialized training in Infor Process Automation, enabling him to design and implement automated workflows that streamline HR operations and improve efficiency.
- **Trained in Infor Workforce Management (WFM) Application:** Randika is trained in the Infor Workforce Management application, equipping him with the skills to manage workforce scheduling, time and attendance, and labor analytics effectively.
- **Certified in Infor M3 Manufacturing and Planning v13.4:** His certification in Infor M3 Manufacturing and Planning v13.4 highlights his proficiency in managing manufacturing processes, planning, and supply chain operations within the Infor M3 environment.
- **Trained in Infor Advanced Planner & Scheduler:** Randika has undergone training in the Infor Advanced Planner & Scheduler, enhancing his ability to optimize production schedules and improve overall planning efficiency.

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Functional Consultant (GHR and Talent Management)

02/2018 - Present

As a **Senior Infor Functional Consultant** at Cendien, Randika has been pivotal in supporting the **Infor Global HR (GHR)** and **Infor Talent Management (ITM)** modules for clients across various industries, including transportation, utilities, and manufacturing. His primary focus is on configuring, optimizing, and providing post-go-live support to ensure that clients' HR and talent management systems function smoothly, delivering tangible business value. He collaborates closely with client HR teams to implement customized solutions and address any functional challenges.

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Responsibilities:

- **Issue Resolution and Post-Go-Live Support:** Randika regularly addresses and resolves complex issue tickets, ensuring that the system operates efficiently post-implementation. His troubleshooting skills allow him to quickly identify root causes of issues, ranging from configuration errors to data integrity problems.
- **Workflow Development & Automation:** He utilizes Infor Process Automation (IPA) to design and implement automated workflows, streamlining HR processes such as performance management, goal setting, and employee reviews. This automation has significantly improved efficiency and reduced the need for manual intervention in key HR activities.
- **Goal & Performance Management Implementation:** Randika leads the implementation of Goal & Performance Management modules, working with key stakeholders to configure the system to meet their business needs. He delivers training to users on these modules, ensuring smooth transitions and enabling key users to leverage the tools for employee development and performance tracking.
- **Training and Change Management:** He conducts training sessions for both end-users and key stakeholders, helping them navigate the GHR and Talent Management systems. This training helps clients reduce reliance on consultants by building internal capability, ensuring long-term system success.

Chicago Regional Transportation Authority (RTA)

For the Regional Transportation Authority (RTA), a public transit provider, he is responsible for implementing and supporting the Goal & Performance Management modules, which are central to the organization's talent management strategy. Working with a team of IT and HR professionals, he ensures that the system meets the specific needs of the public transportation sector.

Responsibilities:

- **Implementing Goal & Performance Management Modules:** Led the full-cycle implementation of the Goal & Performance Management modules, working with HR stakeholders to align system configurations with their talent management strategies.
- **Training & Support:** Delivered comprehensive training on the Goal & Performance Management modules to HR personnel, ensuring they are equipped to use the system to track employee performance, set objectives, and conduct reviews effectively.
- **Workflow Optimization:** Designed and implemented workflow automation through Infor Process Automation (IPA) to improve the efficiency of performance evaluations and other HR processes. His work has led to more streamlined operations and a significant reduction in manual interventions.

Santa Clara Valley Water District

At SC Valley Water, a leading water management organization in California, he provides functional support for Infor GHR and Talent Management modules. His role involves overseeing day-to-day system operations, managing data integrity, and assisting with the implementation of standard reports and automated workflows to improve the HR processes for the organization.

Responsibilities:

- **System and Report Configuration:** Configured and maintained standard reports in Infor GHR, which provided actionable insights for the HR team and other departments.
- **Workflow and Integration Development:** Worked closely with the IT team to develop workflows and integrations with other systems, ensuring seamless data flow and accurate reporting.

- **Data Management and User Support:** Provided ongoing data management support, helping to maintain the integrity and accuracy of HR-related data. Delivered on-demand user support for troubleshooting and issue resolution.

General Nutrition Centers (GNC)

As part of the GNC team, he worked on improving the application and security configuration areas for their Infor Talent Management system. GNC, a leading health and wellness brand, required a robust HR system to manage its growing workforce and improve internal processes. His expertise in security role configuration and issue resolution ensured smooth HR operations throughout the implementation and beyond.

Responsibilities:

- **Security Configuration:** Led the security role configuration process for GNC's HR system, ensuring that access permissions were tailored to specific user groups across various organizational levels.
- **Application Changes and Updates:** Managed application updates and changes, including adjusting configurations to accommodate evolving HR policies and business needs.
- **Issue Resolution:** Addressed and resolved issue tickets related to application configurations, ensuring minimal disruption to business operations.

Iron Road – USA

At Iron Road, a leading employee administration company, he was responsible for the implementation of Infor Talent Acquisition and Goal Management Modules. His work involved requirement gathering, system configuration, and managing user training sessions, leading up to a successful go-live and post-go-live support phase.

Responsibilities:

- **Requirement Elicitation & Documentation:** Led requirements gathering workshops to understand business needs and translate them into functional specifications. Ensured alignment between the client's goals and the final system configuration.
- **Configuration and Testing:** Configured the Talent Acquisition and Goal Management modules, conducting thorough testing to ensure the system met the business's operational needs.
- **Go-Live & Post-Go-Live Support:** Provided post-go-live support to troubleshoot issues and ensure that the system ran smoothly post-implementation. This included providing ongoing user support and fine-tuning configurations based on feedback from users.

Urban One Group – USA

Urban One Group, a major media group, required Infor Talent Management to streamline its HR processes and improve its talent acquisition and management strategies. He played a key role in the implementation of the Talent Acquisition module, ensuring that it was properly integrated with external systems like HireRight and Indeed.

Responsibilities:

- **Talent Acquisition Implementation:** Managed the implementation of the Talent Acquisition module, working closely with HR teams to ensure the system met the needs of a dynamic media company.
- **Integration with External Systems:** Configured integrations with external job boards and recruitment tools, improving the efficiency and reach of the company's talent acquisition processes.

- **Training and Documentation:** Provided thorough training to HR teams and documentation for ongoing system management, ensuring that the team could operate the system independently after the go-live phase.

Brandix Group

He led a project at Brandix Group, the largest apparel exporter in Sri Lanka, to develop and implement a Talent Review Application system. This included the design and development of dashboards for managers, allowing them to track employee performance and manage talent effectively.

Responsibilities:

- **Requirement Elicitation & Solution Design:** Conducted in-depth requirement gathering sessions with key stakeholders and worked with the development team to design a Talent Review system that met Brandix's needs.
- **Integration Development:** Developed integration scripts for Infor Talent Management (ITM), facilitating seamless data exchange between systems.
- **Report Development & Testing:** Developed and tested custom SSRS reports to enhance the decision-making process for managers and HR personnel.

Textured Jersey

At Textured Jersey, a leading textile manufacturer, he was responsible for implementing Infor Talent Management. His work focused on key modules such as Goal Management, Performance Management, and Learning & Development, ensuring they were tailored to the company's operational needs.

Responsibilities:

- **Module Configuration & Testing:** Configured and tested the Goal Management and Performance Management modules, ensuring they were aligned with HR's requirements for tracking employee development and performance.
- **Workflow Automation:** Utilized Infor Process Automation (IPA) to automate several HR processes, such as performance reviews and goal setting, reducing manual work and improving process efficiency.
- **Training and Support:** Conducted training sessions for key users and provided post-go-live support to ensure successful system adoption and continuous improvement.

Education

MBA in Project Management, Cardiff Metropolitan University, UK (2016)

B.S. (Hons) in Management Information Systems, University College of Dublin, Ireland, (2011)



Senior Infor FSC SCM Consultant
Consultant: Siva Kumar

Professional Summary

With over 13 years of extensive experience as a Business Leader and **Infor Consultant**, he has successfully led a diverse range of **Infor ERP** implementations and consulting projects across various industries, specializing in **Infor CloudSuite Financials (CSF)**, **Infor Lawson Finance**, and **Supply Chain Management (SCM)**. His deep expertise spans both functional and technical consulting, particularly in the areas of **business process mapping**, **gap analysis**, **solution design**, and **integration architecture**.

He is recognized for his ability to deliver innovative solutions that streamline business operations, enhance system performance, and optimize financial management. As an integration architect, he has played a pivotal role in designing and implementing complex system integrations, connecting **Infor CloudSuite Financials** and **Infor Lawson** with other critical business systems, including **Clinical Systems**, **Retail POS**, and **HCM** applications. His expertise in data migration, legacy system conversions, and custom solution validation has consistently led to the successful deployment of large-scale projects on time and within budget.

His proven **leadership in managing cross-functional teams**, coupled with a commitment to applying best practices, allows him to guide clients through the **full project lifecycle**—from initial requirement gathering to post-implementation support—ensuring a seamless transition and lasting operational success. Whether managing multi-million-dollar implementations or **providing ongoing consulting support**, he has consistently demonstrated the ability to drive impactful results and deliver tailored solutions that meet the unique needs of each organization.

Relevant Skills

- **Infor CloudSuite Financials & Lawson Finance/SCM Consulting:** Highly experienced in **implementing and consulting** on **Infor CloudSuite Financials (FSM)** and **Infor Lawson Finance/SCM** modules, with a deep understanding of business processes in finance, supply chain, and human capital management. Adept at configuring these systems to align with organizational goals and improving financial visibility, operational efficiency, and reporting accuracy.
- **Integration Architecture & Solution Design:** An accomplished **integration architect** responsible for designing and implementing **cross-platform integrations**, particularly between **Infor CloudSuite Financials** and **external systems** such as **Clinical Systems**, **Retail POS**, **Human Capital Management (HCM)**, and third-party software. His ability to seamlessly integrate disparate systems ensures data integrity, process alignment, and operational coherence across organizations.
- **Gap Analysis & Process Mapping:** Expertise in conducting **gap analysis** to assess **"As-Is"** business processes, identifying gaps, and mapping **"To-Be"** processes to ensure that the implemented solutions align with client business objectives. Specializes in **business process re-engineering**, ensuring that business operations are optimized and streamlined for improved efficiency and cost-effectiveness.
- **Techno-Functional Expertise:** A blend of **functional consulting** and **technical expertise**, with hands-on experience in **legacy system data conversion**, **data migration**, and **ERP system mapping**. Well-versed in configuring complex ERP systems while ensuring compatibility with existing business systems, workflows, and external applications.

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Senior Infor FSC SCM Consultant
Consultant: Siva Kumar

- **Client-Focused Project Leadership:** Skilled at **leading project teams** to deliver large-scale, complex ERP implementations on time and within scope. Actively engages with clients to define requirements, streamline processes, and manage expectations, ensuring that the solutions delivered meet both immediate needs and long-term strategic goals.
- **Training, Support & Documentation:** Adept at **configuring, training,** and supporting customers on the use of **Infor CloudSuite** applications, providing in-depth **training manuals** and ensuring that key users are well-prepared for ongoing system maintenance and usage.

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Consultant

10/2019 - Present

In his current role at Cendien, he provides expert functional and technical support for a diverse portfolio of clients, specializing in Infor CloudSuite solutions across Financials (FIN), Supply Chain Management (SCM), GHR/Payroll, and Birst BI modules. He works with high-profile clients such as e4, Bon Secours Hospital, Westchester Medical Center, Regional Transportation Authority (RTA), and Valley Water, where he ensures the successful delivery of projects through solution design, system configuration, process improvements, and troubleshooting.

Responsibilities:

- **Comprehensive Support:** Provides end-to-end support, including system configuration, issue resolution, reporting, and post-implementation support, ensuring that each client's Infor CloudSuite solution delivers maximum value.
- **Reporting & Business Intelligence:** Designs and develops custom reports and dashboards in Birst and Infor IPA, enabling clients to gain valuable business insights and make data-driven decisions.
- **Business Process Audits:** Performs comprehensive business process audits, leading to the identification of areas for improvement and the design of more efficient workflows.
- **Major Upgrades and Configurations:** Manages complex upgrade projects, ensuring that clients' systems are consistently updated and optimized for the latest business and regulatory needs.

Arabian Centres – Riyadh, Saudi Arabia
Senior Infor Consultant

07/2018-10/2019

At Arabian Centres, a leading retail and commercial real estate company, he was responsible for the implementation of Infor CloudSuite Financials (CSF), with a particular focus on the Finance module. His work involved close collaboration with the client's IT and business teams to design and deploy integrated solutions, including the seamless connection of CSF with other business applications like GFC, XM, and HCM.

Responsibilities:

- **Business Process Mapping & Gap Analysis:** Led gap analysis and business process mapping sessions to identify the necessary changes for aligning current operations with Infor CSF capabilities.
- **Integration Solutions:** Designed integration solutions to connect CSF with external applications, including third-party systems for accounts receivable (AR) management.

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- **Localization Requirements:** Worked closely with the Infor R&D team to incorporate localizations specific to the Saudi Arabian market, including tax and regulatory compliance features.

Aldara Hospitals – Riyadh, Saudi Arabia
Infor Consultant

04/2017-07/2018

At Aldara Hospitals, a premier healthcare provider, he led the functional consulting efforts for Infor Lawson Finance and HCM, ensuring that the hospital's financial and HR systems were fully integrated with their clinical operations. His role included designing security for the system, integrating with Cerner and PHS, and ensuring data was migrated correctly.

Responsibilities:

- **ERP & Clinical System Integration:** Integrated Infor Lawson ERP with Cerner and PHS, enabling streamlined hospital management processes and real-time data exchange between departments.
- **Security Design:** Designed and configured Infor Lawson application security, ensuring that users across various hospital departments had the appropriate access levels.
- **Business Process Optimization:** Led efforts to optimize the hospital's business processes, improving operational efficiencies and reducing redundancies.

United Cement Industrial Company – Jeddah, Saudi Arabia
Infor Consultant

01/2016-03/2017

He was responsible for the implementation of Infor HCM at United Cement Industrial Company, a key player in the cement manufacturing sector. He guided the company through process mapping, gap analysis, and the implementation of Infor Payroll for their manufacturing workforce.

Responsibilities:

- **Business Process Design & Optimization:** Worked closely with stakeholders to map existing processes and identify areas for improvement. Successfully designed and implemented HCM processes tailored to the cement manufacturing industry's unique requirements.
- **Data Migration & Conversion:** Led data migration and conversion efforts for HCM and Payroll modules, ensuring smooth data transfer from legacy systems to Infor ERP.
- **Documentation & Training:** Developed comprehensive training manuals and business process documentation to guide employees through system usage post-implementation.

Saudi Bugshan Group of Companies – Jeddah, Saudi Arabia
Infor Consultant

08/2015-12/2015

As an Infor Consultant at Saudi Bugshan Group, he played a pivotal role in the design and implementation of Infor applications within a diverse set of industries, including retail, healthcare, and manufacturing.

Responsibilities:

- **Solution Architecture:** Worked as the Solution Architect for multiple Infor application projects, providing expertise in ERP integrations and recommending enhancements based on business requirements and localization needs.



Senior Infor FSC SCM Consultant
Consultant: Siva Kumar

- **Data Migration & Conversion:** Managed data migration and ensured smooth conversion from legacy systems, adhering to project timelines and ensuring minimal disruption to business operations.

Uchumi Supermarkets Ltd – Nairobi, Kenya
Infor Consultant

02/2015-07/2015

At Uchumi Supermarkets, one of Kenya's largest retail chains, he was responsible for Infor Lawson Finance consulting and business process reengineering. His work involved configuring Lawson S3 Finance and designing integrations between Infor Lawson ERP and POS systems.

Responsibilities:

- **Financial Consulting & Process Reengineering:** Analyzed and designed solutions to optimize financial processes within Lawson S3 Finance, ensuring a more efficient workflow for accounting, budgeting, and reporting.
- **POS Integration:** Designed and implemented integration solutions for retail POS systems with Infor Lawson, allowing for seamless transaction management and real-time financial reporting.

Cleveland Clinic Abu Dhabi – Abu Dhabi, UAE
Infor Consultant

10/2014-01/2015

At Cleveland Clinic Abu Dhabi, he contributed to the implementation of Infor Lawson ERP for the healthcare sector, providing expertise in finance module implementation, data migration, and system integration with hospital management systems.

Responsibilities:

- **System Integration:** Led the integration of Infor Lawson ERP with hospital management systems for more effective patient and financial data management.
- **Support & Documentation:** Provided post-implementation support and developed user-friendly training materials to ensure ongoing success with the system.

Education

Bachelor of Engineering in Computer Science



Senior Infor CloudSuite HCM Consultant
Consultant: Raj Kumar

Professional Summary

Raj has over eight years of experience in **Infor CloudSuite Human Capital Management (HCM)** and a strong blend of **IT and HR expertise**, establishing himself as a proficient **Infor HCM Consultant**. He specializes in the implementation, support, and optimization of Infor HCM modules.

His career journey began with foundational roles in various aspects of **human resources**, providing him with a deep understanding of **HR processes, workflows, and challenges**. This background has been invaluable during requirement analysis, enabling him to design and deliver practical, scalable solutions tailored to client needs.

Raj's dual proficiency in **HR domain knowledge and technical expertise** has made him an effective **Techno-Functional Consultant**. By leveraging his HR insights, he communicates business processes effectively to technical teams, ensuring that system configurations, data structures, and integration points align with clients' operational goals. Whether leading an **Infor HCM implementation** as a functional consultant, guiding a technical team, or troubleshooting **post-implementation issues**, he excels at delivering high-quality solutions that enhance HR functionality, streamline processes, and improve operational efficiency.

Having worked in diverse sectors, including healthcare, government, and the public sector, Raj has developed a versatile skill set and a deep understanding of sector-specific challenges and regulatory requirements. He is adept at managing and customizing various **Infor HCM modules** such as **GHR, Payroll, Performance Management, Absence Management**, and **Benefits**, ensuring that systems are optimized for each client's unique business processes. His extensive hands-on experience with Infor Lawson, Infor Process Flow, Infor Smart Office, and related tools makes him a trusted advisor for clients navigating complex HCM projects.

Relevant Skills

- **Infor HCM Expertise:** Extensive experience implementing and supporting key **Infor HCM modules**, including **GHR (Global Human Resources), Payroll, Absence Management, Performance Management, Position Budgeting, Employee Health, and Benefits Administration**. Proficient in configuring master setups, data management, and troubleshooting system issues to ensure smooth HR operations.
- **Techno-Functional Consulting:** Expertise in bridging the gap between HR business processes and technical solutions. Adept at translating **HR requirements** into feasible system configurations, ensuring that **Infor HCM** solutions are fully aligned with business goals and objectives.
- **System Integration & Customization:** Skilled in **system integration**, including **interface design and security configuration**. Experience in **customizing Infor HCM applications** to meet unique client needs, whether through modifying user interfaces, creating custom reports, or implementing new workflows.
- **Implementation & Support:** Demonstrated success in the **end-to-end implementation** of Infor HCM systems, from requirements gathering and design to post-implementation support. Provides **go-live support, knowledge transfer, and troubleshooting**, ensuring that clients can effectively manage their HR operations after system deployment.

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Senior Infor CloudSuite HCM Consultant
Consultant: Raj Kumar

- **Data Management & Reporting:** Proficient in **data migration**, including historical data loads, using **Spreadsheet Designer** and **Infor Lawson Add-ins**. Strong expertise in **reporting** and **dashboard creation** to support HR decision-making and operational efficiency.
- **Sector Experience:** Significant experience working in **healthcare, public sector, and government** organizations, providing insights into sector-specific requirements, regulatory compliance, and best practices in HR system management.
- **Tools & Technologies:** Expertise in **Infor Lawson Mingle, Lawson Interface Desktop (LID), Infor Process Flow, Infor Smart Office, and Infor Spreadsheet Designer**. Proficient in **SQL Server and DB2** for database management and query optimization.

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Consultant

10/2019 - Present

At Cendien, Raj has been instrumental in delivering end-to-end **Infor CloudSuite** and **Infor Lawson** solutions to a diverse set of clients. With a strong focus on the **CloudSuite Financials (FSM)** and **Supply Chain Management (SCM)** modules, he has helped organizations across various sectors, including healthcare, transportation, and water utilities, optimize their HCM and financial management systems.

He has worked closely with clients such as e4, Bon Secours Hospital, Westchester Medical Center, Regional Transportation Authority (RTA), and Valley Water, providing both **functional and technical expertise** in **Infor CloudSuite** and **Infor Lawson Finance** and **Supply Chain Management** modules. His responsibilities included conducting **gap analysis**, **business process redesign**, and requirement gathering to design effective and tailored solutions that align with each client's specific needs.

Responsibilities:

- **Conducting Gap Analysis:** Identifying discrepancies between current processes and desired outcomes.
- **Business Process Redesign:** Streamlining and optimizing workflows to enhance efficiency.
- **Requirement Gathering:** Collaborating with stakeholders to understand and document business needs.
- **System Upgrades and Configuration Enhancements:** Leading major system upgrades and improving configurations for better performance.
- **Integration Architecture:** Designing and implementing integration solutions to connect Infor CloudSuite with external systems.
- **Reporting Design and Customization:** Creating custom reports using Birst BI and IPA Reporting to provide actionable insights.
- **Training and Post-Go-Live Support:** Ensuring smooth transitions from legacy systems and providing ongoing support.

Skillsets:

- **Infor CloudSuite Financials (FSM) and SCM:** Deep expertise in financial and supply chain management modules.

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- **Infor Lawson:** Proficient in Infor Lawson Finance/SCM modules.
- **Technical and Functional Expertise:** Strong blend of IT and HR knowledge, enabling effective communication between business and technical teams.
- **Integration Solutions:** Skilled in designing integration architectures for seamless system connectivity.
- **Custom Reporting:** Experienced in creating tailored reports to meet specific client needs.
- **Project Management:** Capable of leading projects from inception to completion, ensuring timely and successful delivery.
- **Client Collaboration:** Adept at working closely with clients to understand their unique requirements and deliver customized solutions.

Raj's extensive hands-on experience with Infor Lawson, Infor Process Flow, Infor Smart Office, and related tools makes him a trusted advisor for clients navigating complex HCM projects. His ability to deliver high-quality solutions that enhance HR functionality, streamline processes, and improve operational efficiency has been a key factor in his success at Cendien.

PrimEra Medical Technologies – Bengaluru, India
Senior Consultant – Lawson

2016 – Present

At PrimEra Medical, he played a key role in the design, **deployment, testing, and implementation** of Infor HCM solutions in healthcare environments. His work focuses on integrating and optimizing various modules such as GHR, Payroll, Absence Management, Performance Management, Benefits, and Position Budgeting. He has consistently demonstrated an ability to configure systems based on business requirements and ensure smooth transitions during implementation.

Responsibilities:

- **Solution Design & Deployment:** Designed and deployed Infor HCM solutions across multiple healthcare facilities, ensuring alignment with client requirements and industry best practices.
- **System Configuration & Testing:** Responsible for configuring system setups, including master data configuration, position budgeting, and payroll setup. Conducted thorough testing to ensure that the system met all client requirements and was optimized for HR operations.
- **Data Migration:** Led the historical data load process using Infor Spreadsheet Designer and Lawson Add-ins, ensuring accurate and efficient migration from legacy systems.
- **Client Support:** Provided comprehensive go-live support, ensuring that clients were equipped with the knowledge and resources necessary for post-implementation success. Assisted clients in navigating the transition smoothly through knowledge transfer sessions.
- **Issue Resolution:** Managed support tickets, troubleshooting issues related to payroll processing, HR transactions, and system interfaces to ensure timely resolution and uninterrupted business operations.
- **Customization & Reporting:** Developed custom appraisal forms, user fields, and system configurations based on client needs. Addressed interface issues between GHR and S3, ensuring seamless data transfer.



Senior Infor CloudSuite HCM Consultant
Consultant: Raj Kumar

Greeno Tech Solution – Bengaluru, India
Business Consultant

2013 – 2016

During his tenure at Greeno Tech Solution, he worked on multiple high-profile projects, including those for government entities and healthcare providers. He was responsible for gathering client requirements, coordinating development teams, and overseeing system customizations to improve HR processes.

Responsibilities:

Project 1: Government of Tanzania:

- Provided end-to-end support for the Infor HCM system, from requirement analysis to production sign-off.
- Worked closely with the technical team to resolve business issues and ensure system alignment with client expectations.
- Designed and implemented security classes and roles, ensuring secure and appropriate system access for users.
- Acted as the primary point of contact for client queries and new requirements, ensuring clear communication and effective resolution of issues.

Project 2: Royal Hospital for Women, Bahrain:

- Led the end-to-end implementation of Infor Human Capital Management (HCM), including Talent Management & Workforce Management (WFM).
- Conducted requirements gathering, system setup, and user training, ensuring that the system met the unique needs of the healthcare environment.
- Coordinated with the development team to design custom reports and ensure the system's functionality met the client's expectations.

Jean Martin – Bengaluru, India
Senior HR Executive

2012 – 2013

In this role, he was responsible for a variety of HR functions, including time and attendance management, payroll processing, and ensuring compliance with internal policies and procedures.

Responsibilities:

- Managed employee records in the HRIS and provided necessary payroll input to the finance team.
- Developed and enforced HR policies across the organization to ensure consistency and compliance.
- Coordinated attendance and leave management systems to ensure accurate employee records.

Mobile Global Limited (On Subcontract through Team Lease) – Bengaluru, India
HR Executive

2010 – 2012

At Mobile Global Limited, he was responsible for the creation and maintenance of employee records, handling payroll data, and managing HRIS-related tasks.



Senior Infor CloudSuite HCM Consultant
Consultant: Raj Kumar

Responsibilities:

- Created and maintained personnel records for new employees in the HRIS system, ensuring accuracy and compliance.
- Provided payroll input for new employees and validated payroll outputs, ensuring data accuracy for compensation and leave management.
- Developed HR dashboards for head-count analysis and assisted with system testing for new HR capabilities.

Relativity Management Solution Private Limited – Bengaluru, India
Senior Analyst – HR and Business Operations

2009 – 2010

At Relativity Management, he handled day-to-day HR activities, including attendance management, payroll processing, and training coordination.

Responsibilities:

- Managed attendance and leave data for employees, ensuring accurate payroll processing.
- Coordinated various training programs to enhance employee skills and ensure HR compliance.

Kalaikathir Achachagam – Coimbatore, India
HR Executive

2008 – 2009

At Kalaikathir Achachagam, he handled a wide range of HR functions, including attendance management, payroll processing, and employee compensation reporting.

Responsibilities:

- Managed payroll processing, including leave management and attendance tracking.
- Prepared monthly compensation reports for management review.

Education

- **MBA (HR and Marketing)** – Coimbatore Institute of Management and Technology, 2007
- **BE (Information Technology)** – Karunya Institute of Technology, 2005
- **HSC** – Tagore Matriculation School, 2001
- **SSLC** – Government Higher Secondary School, 1999



Senior Infor Techno Functional HCM Consultant
Consultant: Subba Mopuru

Professional Summary

Subba's is a **Senior Infor HCM Tech Consultant** with extensive experience and diverse skill set which are truly impressive! With over 17 years in the field, he has a wealth of knowledge in various environments like **LAWSON, Mainframe, AS/400, AIX, and Windows**. His expertise spans from **installation and configuration** to system administration and performance monitoring, particularly with **Lawson S3 Suites**.

His background as an **Oracle Developer**, with more than 9 years of experience, highlights his proficiency in developing backend modules using **SQL and PL/SQL**. Subba has also led numerous upgrades and migrations, including transitioning systems to Infor Cloud environments, which showcases his adaptability to new technologies.

Additionally, his involvement in JAD sessions and his role in reporting and analytics through **Crystal Reports** in Lawson Business Intelligence demonstrate his ability to bridge the gap between technical teams and business stakeholders. His skills in custom application development, system health monitoring, and security setup further underline his comprehensive approach to managing and optimizing business applications.

- **Over 17 years of experience** in the design, development, customization, maintenance, and implementation of various commercial and business software applications, specifically on **LAWSON, Mainframe, AS/400, AIX, and Windows environments**. He has a strong track record in providing high-quality solutions across a wide range of industries, managing both front-end and back-end processes to deliver comprehensive business applications.
- Extensive experience in **installation, configuration, and administration of Lawson S3 Suites** (HCM, GHR, PR, BN, LTM, SCM, EMSS) on **NT, UNIX, and AS400 environments**, including system setup, performance monitoring, and ensuring system availability.
- More than **9 years of experience** working as an **Oracle Developer**, with in-depth expertise in **Oracle 8i, 9i, 10g, and 11g R1**. He has successfully developed backend modules, such as **packages, functions, procedures, triggers, object types, views, and snapshots** for multi-tier business applications, both for **Data Warehouses and OLTP systems** using **SQL and PL/SQL**.
- Led numerous **Lawson environment/application upgrades**, transitioning systems from versions **8.1 to 9.0/10.0**, and has been involved in migrating to **Infor Cloud environments**.
- Developed **custom COBOL, RPG, Easytrieve, and UNIX applications** to integrate **Lawson systems with non-Lawson applications**, ensuring smooth data flow across platforms.
- Actively participated in **JAD (Joint Application Development)** sessions, facilitating communication between business stakeholders and technical teams to ensure alignment with business goals.
- Demonstrated expertise in **reporting and analytics**, particularly through the **design and implementation of Crystal Reports in Lawson Business Intelligence (LBI)**, providing actionable insights to stakeholders.
- Played a key role as the **Lawson System Administrator**, overseeing system health, applying patches, and ensuring the efficient operation of the environment.
- Led the **Lawson Security Setup** and provided ongoing support for **LAUA/LSF 9.0**, maintaining data integrity and user access controls.
- Proficient in monitoring and managing system health, including **disk space management, log reviews, and identifying hung processes**.

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Senior Infor Techno Functional HCM Consultant
Consultant: Subba Mopuru

Relevant Skills

- Led the **design and implementation** of key modules such as **HR, Payroll, Procurement, AP, and GL interfaces**, ensuring seamless integration and data flow across various systems.
- Performed **unit testing, integration testing, and user acceptance testing (UAT)** to ensure all modules met business requirements and functioned as expected.
- Developed a strong understanding of **relational database management systems (RDMS)**, with hands-on experience in databases such as **Oracle, SQL Server, Teradata, DB2, and IMS**, applying best practices for data management, performance optimization, and troubleshooting.
- Managed the complete **software development lifecycle (SDLC)** for a variety of applications, utilizing methodologies such as **PMO and Six Sigma**, to ensure project delivery on time and within scope.
- Extensive experience in **production support**, including troubleshooting and resolving critical issues, as well as performing root cause analysis and implementing corrective measures to maintain operational continuity.
- Provided support for various third-party applications such as **BSI, Vertex, MHC, ImageNow, BottomLine, Ascend, Ariba, and SRExpense**, ensuring integration and smooth operations between systems.

ERP/Languages

- **Lawson (10.x, 9.x, 8.x)** – Financial, HR, Payroll, Procurement, and Supply Chain Suites
- **MFCOBOL, Oracle, DB2, Java/J2EE, Visual Basic**

User Interface/Tools/Other Software

- **LID, Portal, Design Studio, Lawson Add-ins, LBI, K-Shell, Crystal Reports, MS Office, and MS Project**

Operating System/Business Applications

- **MS-DOS, OS/390, AS/400, and UNIX**

Databases/Applications Servers

- **Lawson: Mainframe, HP, Sun, DB2, Oracle, SQL Server, IIS, and WebSphere**
- **Lawson Application Server, Lawson Case Tool, Job Scheduler, LID, Portal, LBI, Lawson Workbench, User Security Utility, MSS, ESS, Program Def, Database Def, AP, GL, SL, AR, PO, AM (FA), MA, PR, BN, HR, TA, etc.**
- **Java: Java Beans, EJB, XML, Servlets, J2EE, JSP, HTML, JavaScript**
- **Microsoft Products: IIS, Visual Basic, .Net, Visual Studio, Crystal Reports, SQL Server**



Senior Infor Techno Functional HCM Consultant
Consultant: Subba Mopuru

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Consultant

2021 - Present

Subba's extensive experience and diverse skill set are truly impressive! With over 17 years in the field, he has a wealth of knowledge in various environments like LAWSON, Mainframe, AS/400, AIX, and Windows. His expertise spans from installation and configuration to system administration and performance monitoring, particularly with Lawson S3 Suites.

- Led the Infor CloudSuite FSM v11 implementation across multiple business modules, including GL, AP, MA, Projects, Assets, Cash Ledger, and Budgets.
- Provided expertise in migrating clients from the V11 and V10 shared services model to the cloud, ensuring seamless transition and system optimization.

Experience Key Highlights:

- **FSM v11 Implementation:** Led the implementation of FSM v11 across multiple business modules, including General Ledger (GL), Accounts Payable (AP), Materials Management (MA), Projects, Assets, Cash Ledger, and Budgets, ensuring comprehensive coverage and integration.
- **Cloud Migration Expertise:** Provided expertise in migrating clients from the v10 shared services model to the cloud, ensuring a seamless transition and system optimization.
- **Oracle Development:** With over 9 years of experience as an Oracle Developer, Subba has in-depth expertise in Oracle 8i, 9i, 10g, and 11g R1. He has successfully developed backend modules, such as packages, functions, procedures, triggers, object types, views, and snapshots for multi-tier business applications, both for Data Warehouses and OLTP systems using SQL and PL/SQL.
- **Lawson Environment Upgrades:** Led numerous Lawson environment/application upgrades, transitioning systems from versions 8.1 to 9.0/10.0, and has been involved in migrating to Infor Cloud environments.
- **Custom Application Development:** Developed custom COBOL, RPG, Easytrieve, and UNIX applications to integrate Lawson systems with non-Lawson applications, ensuring smooth data flow across platforms.
- **Joint Application Development (JAD):** Actively participated in JAD sessions, facilitating communication between business stakeholders and technical teams to ensure alignment with business goals.
- **Reporting and Analytics:** Demonstrated expertise in reporting and analytics, particularly through the design and implementation of Crystal Reports in Lawson Business Intelligence (LBI), providing actionable insights to stakeholders.
- **System Administration:** Played a key role as the Lawson System Administrator, overseeing system health, applying patches, and ensuring the efficient operation of the environment.
- **Lawson Security Setup:** Led the Lawson Security Setup and provided ongoing support for LAUA/LSF 9.0, maintaining data integrity and user access controls.
- **System Health Monitoring:** Proficient in monitoring and managing system health, including disk space management, log reviews, and identifying hung processes.

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Senior Infor Techno Functional HCM Consultant
Consultant: Subba Mopuru

Subba's ability to lead complex implementations, his deep technical expertise, and his strong communication skills make him an asset in any organization.

Belk Stores – Charlotte, NC

11/2017 – 2021

Senior Lawson Support Analyst

- **Administered Lawson Systems:** Oversaw user management, executed patch installations, and monitored system health to ensure optimal performance.
- **Led Interface Development:** Spearheaded the creation of seamless interfaces between Workday, Lawson, and Concur, significantly enhancing data flow and business efficiency.
- **Innovated Reporting Solutions:** Developed and supported new interfaces for P-Card invoices and ad-hoc reporting using Lawson Business Intelligence (LBI), streamlining financial processes.
- **Resolved System Issues:** Conducted thorough root cause analysis and collaborated with internal teams to troubleshoot and implement effective solutions for system issues.

Aqua America Inc – PA

08/2017 – 11/2017

Senior Lawson Techno Functional Consultant

- **Administered Lawson Systems:** Oversaw user management, executed patch installations, and monitored system health to ensure optimal performance.
- **Led Interface Development:** Spearheaded the creation of seamless interfaces between Workday, Lawson, and Concur, significantly enhancing data flow and business efficiency.
- **Innovated Reporting Solutions:** Developed and supported new interfaces for P-Card invoices and ad-hoc reporting using Lawson Business Intelligence (LBI), streamlining financial processes.
- **Resolved System Issues:** Conducted thorough root cause analysis and collaborated with internal teams to troubleshoot and implement effective solutions for system issues.
- **Designed 401k Interface:** Created and implemented a new 401k interface to T-Row Price using IPA, ensuring efficient and accurate data transfer.
- **Optimized User Interfaces:** Customized Lawson Console and Mashups to create optimized user interfaces, improving efficiency and reducing manual processes.

Moffitt Cancer Center – Tampa, FL

01/2017 – 07/2017

Lawson Techno/Functional Consultant

- **Administered Lawson Systems:** Oversaw user management, executed patch installations, and monitored system health to ensure optimal performance.
- **Led Interface Development:** Spearheaded the creation of seamless interfaces between Workday, Lawson, and Concur, significantly enhancing data flow and business efficiency.
- **Innovated Reporting Solutions:** Developed and supported new interfaces for P-Card invoices and ad-hoc reporting using Lawson Business Intelligence (LBI), streamlining financial processes.
- **Resolved System Issues:** Conducted thorough root cause analysis and collaborated with internal teams to troubleshoot and implement effective solutions for system issues.
- **Designed 401k Interface:** Created and implemented a new 401k interface to T-Row Price using IPA, ensuring efficient and accurate data transfer.

- **Optimized User Interfaces:** Customized Lawson Console and Mashups to create optimized user interfaces, improving efficiency and reducing manual processes.
- **Led Client Migrations:** Directed migration efforts for clients such as Palomar Hospital (CA), Mercy Hospital (MO), and DeVry University (IL), transitioning custom COBOL programs, Design Studio changes, and PFI flows from Version 9 to Version 10/11.
- **Ensured Compliance and Data Verification:** Designed and implemented interfaces for ACA compliance and employee data verification with Equifax and Clairvia.
- **Migrated to Infor Cloud:** Assisted in migrating the Lawson system from on-premise (V9) to Infor Cloud (V11), managing the migration and resolving issues as they arose.
- **Enhanced Reporting Capabilities:** Converted over 150 process flows and reports from MS Access to LBI and IPA for the Grants and Contract Management modules, significantly improving reporting capabilities.

CIBER

03/2015 – 12/2016

Lawson Techno/Functional Consultant

- **Administered Lawson Systems:** Oversaw user management, executed patch installations, and monitored system health to ensure optimal performance.
- **Led Interface Development:** Spearheaded the creation of seamless interfaces between Workday, Lawson, and Concur, significantly enhancing data flow and business efficiency.
- **Innovated Reporting Solutions:** Developed and supported new interfaces for P-Card invoices and ad-hoc reporting using Lawson Business Intelligence (LBI), streamlining financial processes.
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- **Ensured Compliance and Data Verification:** Designed and implemented interfaces for ACA compliance and employee data verification with Equifax and Clairvia.

Atlanta Public Schools – Atlanta, GA

04/2014 – 02/2015

Lawson Techno/Functional Consultant

- Served as a subject matter expert, providing expert support for **Lawson HR/PR/BN/AC/AP/AR/GL** modules.
- Developed new programs and interfaces, including integrating with **third-party vendors** such as **Penco, SHBP, and MetLife**.
- Conducted **end-to-end testing**, ensuring all system functionality and interfaces worked seamlessly.



Senior Infor Techno Functional HCM Consultant
Consultant: Subba Mopuru

Education

- Dale Carnegie Class Graduate
- **Bachelor of Technology (BTech) in Mechanical Engineering**, S.V University, India
- IBM Certified OS/390 Professional, trained at IBM Authorized Training Partner



Senior Infor CloudSuite SCM Consultant
Consultant: Ardelle O'Brien

Professional Summary

Ardelle is a highly accomplished and results-driven professional specializing in **Supply Chain Management (SCM)**, with a particular focus on the healthcare sector. She has a proven track record of **leading multiple large-scale supply chain implementations**, earning a reputation for her ability to transform business operations and enhance efficiency through the strategic use of technology.

In her role as a consultant within **Infor's Enterprise Applications Solutions and Integration Practice**, Ardelle has worked on a diverse range of engagements. She excels in business requirements gathering, solution design, system testing, training, and full implementation. Her expertise extends to **managing multi-tenant CloudSuite FSM implementations**, where she has demonstrated exceptional skills in requisition, inventory control, purchasing, and procurement processes.

As a **Senior Functional SCM Lead**, Ardelle has successfully navigated complex environments, showcasing her deep understanding of healthcare systems and the unique challenges they present. She holds an Infor Certification in Supply Chain Management – Infor CloudSuites, underscoring her high level of proficiency in system configuration, process improvement, and project management.

Ardelle's hands-on experience spans the entire implementation lifecycle, from initial business process design and analysis to post-production support. This comprehensive skill set makes her an invaluable asset in any consulting or project management capacity. Her dedication to improving business operations through technology and her ability to deliver exceptional results consistently highlight her as a leader in the field of Supply Chain Management.

Relevant Skills

- **Infor v11 Certified in Supply Chain Management – Infor CloudSuites:** Certified expert in Infor CloudSuite solutions, with specialized knowledge in the healthcare industry's SCM needs.
- **Functional SCM Lead for Multi-Tenant CloudSuite FSM Implementation:** Led the integration of two large healthcare systems in New York, resulting in a unified and efficient Supply Chain Management environment.
- **Project Management & Leadership:** Skilled at managing cross-functional teams, ensuring on-time and on-budget project delivery. Proven ability to develop and implement project plans, lead status meetings, and ensure stakeholder communication is clear and effective.
- **Supply Chain System Expertise:** Extensive experience with Infor SCM modules, including Requisition, Inventory Control, Purchasing, Punchout, and Mobile Supply Chain Management.
- **System Design & Configuration:** Expertise in configuring and customizing Infor CloudSuite to meet specific business requirements and streamline supply chain processes.
- **Business Process Improvement & Training:** Adept at identifying inefficiencies and leading process improvement initiatives. Experienced in creating training materials, delivering instructor-led sessions, and ensuring smooth system adoption among end-users.



Senior Infor CloudSuite SCM Consultant
Consultant: Ardelle O'Brien

- **End-to-End Implementation Experience:** Expertise in managing the full lifecycle of SCM system implementations, from discovery and design to deployment and post-production support.
- **Birst Reporting & Data Analysis:** Proficient in Birst Report development and testing, ensuring accurate data representation for decision-making.

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Consultant
Responsibilities:

04/2023 - Present

In her current role at Cendien, Ardelle O'Brien continues to demonstrate her specialized expertise in Supply Chain Management (SCM) by serving a diverse range of Infor/Lawson clients. She is instrumental in handling requests for proposals, system upgrades, and process improvement initiatives. Ardelle's efforts are focused on ensuring that her clients achieve operational excellence and optimize their supply chain operations.

Her work involves a deep dive into each client's unique needs, providing tailored solutions that enhance efficiency and effectiveness. By leveraging her extensive experience and knowledge, Ardelle helps clients navigate the complexities of SCM, driving significant improvements in their processes and systems.

In her current role at Cendien, Ardelle O'Brien provides specialized SCM expertise to a range of Infor/Lawson clients. Her responsibilities include:

- **Handling Requests for Proposals (RFPs):** Ardelle meticulously prepares and responds to RFPs, ensuring that proposals are tailored to meet the specific needs and goals of each client.
- **System Upgrades:** She oversees the planning and execution of system upgrades, ensuring minimal disruption to operations and seamless transitions to enhanced functionalities.
- **Process Improvement Initiatives:** Ardelle identifies areas for improvement within clients' supply chain processes and implements strategic changes to enhance efficiency and effectiveness.
- **Client Consultation:** She provides expert advice and guidance to clients, helping them navigate complex SCM challenges and optimize their operations.
- **Training and Support:** Ardelle conducts training sessions for client teams, ensuring they are well-equipped to utilize new systems and processes effectively. She also offers ongoing support to address any issues that arise post-implementation.

Her skillset includes:

- **Business Requirements Gathering:** Ardelle excels at understanding and documenting client needs to ensure that solutions are aligned with business objectives.
- **Solution Design:** She is adept at designing comprehensive SCM solutions that integrate seamlessly with existing systems and processes.
- **System Testing:** Ardelle ensures that all solutions are thoroughly tested to guarantee functionality and reliability before full-scale implementation.

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- **Project Management:** With strong project management skills, she effectively coordinates and oversees all aspects of SCM projects, ensuring timely and successful completion.
- **Process Improvement:** Ardelle has a keen eye for identifying inefficiencies and implementing improvements that drive operational excellence.
- **Infor Certification in Supply Chain Management:** Her certification underscores her proficiency in Infor CloudSuites, particularly in requisition, inventory control, purchasing, and procurement processes.
- **Healthcare Systems Expertise:** Ardelle's deep understanding of healthcare systems allows her to address the unique challenges faced by clients in this sector.

Ardelle's comprehensive experience and skillset make her an invaluable asset to Cendien and its clients, consistently driving improvements and achieving operational excellence.

Santa Clara Valley Water District (San Francisco, CA):

In her role at the Santa Clara Valley Water District in San Francisco, CA, Ardelle O'Brien made significant contributions to the development and deployment of Supply Chain data reports. Her responsibilities included:

- **Supervising and Guiding Report Development:** Ardelle led the creation of Birst Reports, ensuring that they accurately reflected Supply Chain data.
- **Providing Subject-Matter Expertise:** She offered her extensive knowledge on reporting best practices, ensuring that the reports were not only accurate but also effective in meeting the organization's needs.
- **Ensuring Data Accuracy:** Ardelle was meticulous in verifying the data used in the reports, maintaining high standards of accuracy and reliability.
- **Conducting Thorough Testing:** Before deployment, she conducted comprehensive testing to confirm the integrity and accuracy of the reports, ensuring they were fully functional and reliable.

These responsibilities highlight Ardelle's expertise in data management and her commitment to delivering high-quality reporting solutions. Her role at the Santa Clara Valley Water District underscores her ability to manage complex projects and provide valuable insights into Supply Chain operations.

- Supervised and guided the development of Birst Reports related to Supply Chain data.
- Provided subject-matter expertise on reporting best practices and ensured data accuracy in reports.
- Conducted thorough testing to confirm the integrity and accuracy of the developed reports before deployment.

Apex Systems
SCM Solution Consultant
Responsibilities:

10/2021 – 04/2023

In this consulting role, Ardelle leads cross-functional teams through the execution of large-scale enterprise software implementations and process improvements. Her primary focus has been guiding clients through business process design, requirements gathering, system configuration, and end-user training.



Senior Infor CloudSuite SCM Consultant
Consultant: Ardelle O'Brien

Virginia Hospital Center Health (Arlington, VA):

- Spearheaded the **conversion** of SCM data from Infor to another ERP system, ensuring a seamless transition.
- Led **data cleansing** activities to prepare for the migration, ensuring data integrity and system compatibility.
- Created detailed business requirements documentation and transformation goals, aligning them with organizational objectives.
- Developed comprehensive **training materials** and conducted in-depth user training to facilitate smooth adoption of the new ERP system.

Beatrice Community Hospital (Beatrice, NE):

- Led the **Business Process Automation (BPA) discovery and implementation**, enhancing operational efficiency across departments.
- Configured applications to align with client needs and conducted interactive testing to ensure system functionality.
- Developed training materials and facilitated user adoption, ensuring that staff were prepared for the new processes and system features.

Amsterdam UMC Infor Healthcare Project (Amsterdam, Netherlands):

- Successfully implemented multiple **Supply Chain modules** within the Infor CloudSuite FSM.
- Managed the **full implementation lifecycle**, including planning, design, build, and deployment phases.
- Delivered training to end users and provided ongoing post-production support to resolve any operational issues.

Grant Thornton LLP
SCM Solution Consultant
Responsibilities:

01/2019 – 10/2021

Ardelle was tasked with transforming business operations for clients by leveraging Infor CloudSuite applications. Her role involved overseeing system configurations, leading workshops, gathering business requirements, and ensuring a seamless end-user transition to new systems.

Novant Health (Raleigh, NC):

- Served as the **Project Manager and Work Stream Lead** for the **Supply Chain Requisition Self-Service (RSS)** project.
- Managed all phases of the implementation, from **discovery and analysis** to **redesign and validation** of health systems' SCM processes.
- Created **training materials** and led the **end-user training** to ensure the success of system deployment.

Bassett Health Network (Cooperstown, NY):

- Led the implementation of various **Supply Chain modules** including **Inventory Control, Punchout, Purchasing, and Contract Management**.
- Conducted comprehensive **testing phases**, developed training sessions, and provided **post-production support**.

OneOncology (Nashville, TN):

- Managed the **full implementation lifecycle** of **Supply Chain modules**, including **Inventory Control, Requisitions, and Purchasing**.

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- Designed and built the Supply Chain system and led the **configuration and unit testing** phases.
- Delivered **end-user training** to ensure a smooth transition to the new system and provided **post-production support**.

Avaap

04/2016 – 01/2019

Senior SCM Solution Consultant

Responsibilities:

During her tenure at Avaap, Ardelle led teams in implementing **Infor CloudSuite FSM** for a wide array of healthcare clients. She was responsible for designing and configuring **Supply Chain applications**, delivering training, and providing hands-on technical support throughout the implementation process.

Grand River Hospital / St. Mary's Hospital (Kitchener, ON, Canada):

- Led the **full implementation service team** for multiple **Supply Chain modules**, including **Inventory Control**, **Mobile Supply Chain Management**, **Purchasing**, and **EDI**.
- Developed and delivered **training sessions** for hospital staff to ensure the successful use of the new systems.
- Led the **testing phases** to ensure the system's configuration met the client's operational needs.

Lafayette General Hospital Systems (Lafayette, LA):

- Managed the implementation of **Supply Chain modules** within **Infor CloudSuite FSM**.
- Worked closely with the client to ensure smooth transition and **post-production support**.
- Led **training sessions** and provided comprehensive **system documentation**.

Palos Health (Palos Heights, IL):

- Led the implementation of **Infor Financial and Supply Chain applications** across the hospital's system.
- Configured **Supply Chain systems**, conducted **unit testing**, and provided **training** for hospital staff.
- Delivered **post-production support** to ensure the system continued to meet the client's evolving needs.

Education

- **MA in Health Information Management** – College of St. Scholastica
- **Master Certificate in Project Management** – College of St. Scholastica
- **BA in Transportation & Logistics and International Business** – University of Wisconsin, Superior



Senior Infor CloudSuite FSM / Financials Consultant
Consultant: Luis

Professional Summary

With over 24 years of extensive experience in **Infor CloudSuite, Infor Lawson ERP, Business Performance Management, Finance, and Supply Chain Management**, Lowell has developed a comprehensive expertise in streamlining operations and driving efficiency across various industries. Throughout his career, he has built a reputation as a results-oriented professional with a proven ability to solve complex problems and improve business processes using innovative solutions. His expertise spans the **entire project lifecycle**, from system implementation and optimization to **training and support**, consistently delivering measurable improvements in efficiency and cost management.

Known for his exceptional **verbal and written communication skills**, Lowell is highly adept at translating complex technical concepts into actionable business solutions. His approach to consulting is data-driven and rooted in a deep understanding of client needs, which has allowed him to successfully lead teams, build strong client relationships, and deliver impactful results. As an **analytical problem-solver**, he is able to anticipate challenges before they arise, develop proactive strategies, and create systems that streamline workflows and improve operational performance.

Lowell is also **highly skilled** in fostering a collaborative work environment, earning trust and building rapport with both clients and team members alike. His ability to understand the technical and business aspects of an organization allows him to drive cross-functional collaboration that yields successful, sustainable outcomes. Through years of hands-on experience, he has become a trusted advisor and consultant to organizations seeking to optimize their financial, supply chain, and operational management systems.

Relevant Skills

- **Enterprise Resource Planning (ERP):** Deep knowledge of **Infor CloudSuite, Infor Lawson, Meditech PMM**, and other enterprise applications for managing financials, supply chain, and business performance.
- **Business Performance Management (BPM):** Extensive experience with tools and systems designed to track, analyze, and improve business performance.
- **Finance & Supply Chain Management:** Expertise in financial systems, procurement, inventory management, and supply chain operations, with a focus on improving business processes through automation and data-driven insights.
- **Computer Skills:** Proficient in a wide range of tools and platforms, including **Infor CloudSuite, Infor Lawson, Unix/Shell scripting, Windows Server, MS-SQL Server, Oracle DBMS, COBOL/4GL, C#, EDI, LAMP-stack**, and more. Comfortable working in both Unix and Windows environments with a solid foundation in system integration and application support.
- **Methodologies & Frameworks:** Experienced in **Lean/Six Sigma** principles, **Agile/Scrum** methodologies, and process optimization frameworks to drive continuous improvement initiatives across teams and systems.
- **Writing & Thought Leadership:** Strong writing skills demonstrated through published articles, case studies, and whitepapers, including topics such as **workflow management, outsourcing applications, and broadband technology**.

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Clients/Experiences

- **Bon Secours Mercy Health (Suffern, NY):** Lowell provided audit and reconciliation services for 3-way matching of purchase orders, receivers, and invoices within the Infor CloudSuite v11 environment, ensuring data accuracy and enhancing financial controls.
- **GE Railcar (Chicago, IL):** Installed and maintained Lawson purchasing and inventory systems on a Unix platform, while developing a custom allocation-and-pick process for railcar repair and services, improving operational efficiency and reducing manual errors.
- **MBI (Norwalk, CT):** Led the installation and maintenance of Lawson financial and order entry systems on both Unix and Windows platforms, developing consolidation and reporting tools and migrating data across systems to enhance reporting accuracy.
- **Weiler Brush (Cresco, PA):** Designed and developed custom Lawson programs for order entry, purchasing, and financial systems, interfacing with Manufacturing Resource Planning systems to improve supply chain efficiency and cost controls.
- **Inter-American Development Bank (Washington, D.C.):** Managed a \$1.5 million project provisioning Lawson financials and purchasing systems on Unix, including implementing Process Flow and High-Availability solutions to ensure system reliability and performance.
- **Wentworth-Douglass Hospital (Dover, NH):** Designed and developed custom interfaces between Lawson financials and Patient Accounting Systems, improving patient refund processing and integrating financial data for better reporting.
- **Saint Mary's Hospital (Huntington, WV):** Led efforts to reduce the liability of \$6M+ to \$3M+ for orders received but not invoiced by performing detailed reconciliations of electronic invoices, taxable items, substitute shipments, and stockless orders.
- **Health Quest (La Grangeville, NY):** Improved the P/O discrepancy rate from 25% to 17% by increasing EDI volume, improving data correction processes, and validating contract pricing, leading to substantial savings.
- **Aldara Hospital and Medical Corporation (Riyadh, Saudi Arabia):** Conducted a comprehensive technical audit on Lawson installation, delivering an executive summary of findings and recommendations for system improvements and optimizations.

Cendien – Carrollton, TX
Senior Infor Consultant

2019 - Present

In his current role at Cendien, provides in-depth audit and consulting services for clients leveraging **Infor CloudSuite** and **Infor Lawson's Financial and Supply Chain Management modules**. He has been instrumental in helping clients improve efficiency through process streamlining, including the development of automated interfaces for cash applications and MRO operations, and resolving data integrity issues through enhanced EDI, MII, DII, and RNI cleanup.

In-Depth Audit and Consulting Services:

- Provides comprehensive audit and consulting services for clients utilizing Infor CloudSuite and Infor Lawson's Financial and Supply Chain Management modules.
- Conducts detailed assessments to identify areas for improvement and optimization.

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Process Streamlining and Efficiency Improvement:

- Develops and implements strategies to streamline processes, significantly enhancing operational efficiency.
- Designs and deploys automated interfaces for cash applications and Maintenance, Repair, and Operations (MRO) activities, reducing manual intervention and errors.

Data Integrity and Cleanup:

- Resolves data integrity issues by enhancing Electronic Data Interchange (EDI), Material Inventory Interface (MII), Data Integration Interface (DII), and Received Not Invoiced (RNI) cleanup processes.
- Ensures accurate and reliable data across financial and supply chain systems.

Client Collaboration and Support:

- Works closely with clients to understand their unique needs and challenges, providing tailored solutions that align with their business objectives.
- Offers ongoing support and training to ensure clients can effectively utilize the Infor systems.

Project Management and Implementation:

- Leads project management efforts for system implementations, ensuring projects are completed on time and within budget.
- Coordinates with cross-functional teams to ensure seamless integration and deployment of Infor solutions.

Technical Expertise and Troubleshooting:

- Leverages deep technical knowledge of Infor CloudSuite and Lawson modules to troubleshoot and resolve complex issues.
- Provides expert guidance on best practices and system optimization.

Documentation and Reporting:

- Creates detailed documentation for processes, system configurations, and user guides.
- Generates comprehensive reports to track project progress and outcomes.

Continuous Improvement:

- Stays updated with the latest Infor technologies and industry trends to provide innovative solutions.
- Continuously seeks opportunities to enhance service delivery and client satisfaction.

Helping Hearts Foundation

2019

Organization Trustee

As the founder and trustee of the **Helping Hearts Foundation**, Lowell played a critical role in establishing a philanthropic organization aimed at supporting educational initiatives in his hometown of Baler, Philippines. Through the foundation, he funded scholarships, teachers' salaries, and capital improvements for K-8 schools, making a significant impact on the community.

HCCS

2011 – 2019

Infor Program Manager

During his tenure at HCCS, he managed client relationships and oversaw the delivery of SaaS-based solutions aimed at enhancing competency and quality of care within healthcare facilities. His responsibilities included supervising LAMP-stack DevOps teams, ensuring strict compliance with regulations such as NIST 800-53, and driving continuous improvement initiatives within an Agile/Scrum environment. His leadership was instrumental in supporting UI/UX

design, fostering innovation, and advancing data modeling efforts, all of which contributed to the overall success and efficiency of the healthcare solutions provided.

Client Relationship Management:

- Managed and nurtured client relationships to ensure satisfaction and successful solution delivery.
- Acted as the primary point of contact for clients, addressing their needs and concerns promptly.

SaaS-Based Solution Delivery:

- Oversaw the implementation and delivery of SaaS-based solutions to improve healthcare facility operations.
- Ensured solutions met client requirements and enhanced the quality of care.

Team Supervision:

- Supervised LAMP-stack DevOps teams, providing guidance and support to ensure project success.
- Fostered a collaborative and productive team environment.

Regulatory Compliance:

- Ensured compliance with regulations such as NIST 800-53, maintaining high standards of security and privacy.
- Implemented best practices to meet regulatory requirements.

Continuous Improvement Initiatives:

- Led continuous improvement initiatives within an Agile/Scrum environment to enhance processes and outcomes.
- Encouraged innovation and the adoption of new technologies and methodologies.

UI/UX Design Support:

- Supported UI/UX design efforts to create user-friendly and effective interfaces.
- Collaborated with design teams to ensure solutions were intuitive and met user needs.

Innovation and Data Modeling:

- Fostered innovation in solution development, encouraging creative problem-solving.
- Advanced data modeling efforts to improve data accuracy and usability.

His leadership and expertise were instrumental in driving the success of HCCS's healthcare solutions, ensuring they met the highest standards of quality and efficiency.

Skumatics

2010 – 2011

Business Owner / Systems Architect

Co-founded **Skumatics**, a firm dedicated to helping healthcare providers significantly **reduce supply expenses** by optimizing their procure-to-pay cycle. Leveraging Electronic Data Interchange (EDI) and developing custom tools, he worked closely with customer teams to identify and implement cost-saving opportunities. His efforts streamlined supply chain processes, resulting in **documented savings and process improvements**. Through his leadership, Skumatics delivered tailored solutions that enhanced operational efficiency and financial performance for healthcare providers.



Senior Infor CloudSuite FSM / Financials Consultant
Consultant: Luis

Velocity Technology Solutions, Inc.
Senior Infor Principal Consultant

2007 – 2010

At **Velocity Technology Solutions**, Lowell participated in pre-sale and implementation support for **Lawson Software** in a **hosting and consulting environment**. He supervised technical teams, provided client training, and contributed to project management, creative problem-solving, and workplan development. He played a significant role in the migration and upgrade projects, particularly for accounts acquired from **Siemens Medical Solutions Health Services**.

Global Healthcare Exchange, LLC.

2004 – 2007

Account Manager

Owned and managed customer relationships at **Global Healthcare Exchange**, where he developed account plans focused on driving savings through audits and improvements in the req-to-check process. He worked closely with vendors and group purchasing organizations to ensure data synchronization and accuracy.

Focus5, Inc.

2001 – 2004

Business Owner

As co-founder of **Focus5**, a product consulting firm, developed strategic alliances and managed responses to **RFPs**. He was responsible for coding specialized business applications and maintaining clients' installed **Lawson systems**, including supporting **Sutter Health's distribution center**.

netASPx, Inc.

1999 – 2001

Manager, Consulting Services

At **netASPx**, he managed a 5-member team responsible for **supporting workflow, collaborative commerce, and analytics applications**. He played a crucial role in working on high-level requirements and specifications for hosting applications. Notably, he developed the **Software Development Life Cycle (SDLC)** for a **Leases Receivable system** for **Mobius Management**, ensuring the system met all necessary requirements and functioned efficiently. His leadership and technical expertise were key in delivering robust solutions and maintaining high standards of support and development within the team.

Qwest Internet Solutions, Inc.

1998 – 1999

Senior Manager, Financial Systems

During his time at **Qwest Internet Solutions**, he managed several internal projects focused on improving billing and order management systems. He reconciled **Lawson** and **Remedy** systems to ensure accurate and efficient processes, identifying discrepancies and implementing solutions to **streamline system integration**. Additionally, he provided **comprehensive accounting and audit** support to various business units, ensuring financial records were accurate and compliant with audit requirements. His **project management skills** were instrumental in leading projects from inception to completion, coordinating with cross-functional teams to achieve business objectives and timelines. Through his efforts, he identified opportunities for **process improvements within billing and order management systems**, implementing best practices to enhance operational efficiency and accuracy. His contributions significantly supported the overall financial health and operational efficiency of the company.



Senior Infor CloudSuite FSM / Financials Consultant
Consultant: Luis

United Systems Consultants, Inc.
Senior Infor Consultant

1996 – 1998

As a Senior Consultant, he provided both functional and technical consulting services, delivering turn-key solutions for clients like the Brooklyn Public Library. His work involved optimizing order fulfillment, warehouse management, and reporting processes using Lawson Software. By leveraging his expertise, he ensured that these systems were efficiently installed and tailored to meet the specific needs of each client, significantly enhancing their operational capabilities.

Education

University of Texas at Arlington – Arlington, Texas
Bachelor of Science in Information Systems

8/2016 to 12/2019

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Professional Summary

Kiran is a **highly motivated** and **results-driven** professional with over 7 years of comprehensive experience in **Infor CloudSuite** and **Infor Lawson ERP Finance** modules. Throughout his career, he has worked with a variety of clients, delivering exceptional consulting and audit services focused on **finance-related** processes. Known for his deep understanding of **financial systems** and his ability to streamline complex business operations, Kiran has become a trusted advisor to organizations looking to optimize their ERP solutions.

Kiran's ability to bridge the gap between the technical and functional aspects of ERP systems has allowed him to consistently exceed client expectations. He ensures that **technical solutions** are aligned with business needs and that users are fully supported throughout the implementation process. This holistic approach ensures smooth transitions during go-lives and **provides critical support** during system optimizations.

Kiran's comprehensive skill set and dedication to excellence make him an invaluable asset to any organization looking to optimize their ERP solutions and achieve their business goals.

Experience: Over 7 years in Infor CloudSuite and Infor Lawson ERP Finance modules.

Industry Focus: Healthcare, supporting over 30 hospitals to optimize ERP solutions.

Summary of Expertise:

- **System Configuration, Design, and Implementation:** Kiran's expertise spans from initial system configuration and design to full-scale implementation. He ensures that each system is tailored to meet the specific needs of his clients, providing a robust foundation for their financial operations.
- **Ongoing Support and Troubleshooting:** Beyond implementation, Kiran offers ongoing support and troubleshooting, ensuring that systems continue to operate smoothly and efficiently. His proactive approach helps prevent issues before they arise and quickly resolves any problems that do occur.

Relevant Skills

Enterprise Resource Planning (ERP): Proficient in Infor CloudSuite and Infor Lawson ERP systems, focusing on Finance modules (General Ledger, Accounts Payable, Asset Management, Cash Book).

Financial Management:

- Month-end closing, account reconciliation, tax management, cash management.
- Bank reconciliations and financial reporting.

System Integration & Interfaces:

- Integrating Infor Lawson with EPIC and Meditech HIM systems.
- Managing data exchanges and ensuring seamless information flow.

Reporting & Documentation:

- Expertise in RW (Reporting Writer), General Ledger reports, custom reports.
- Developing user guides, training materials, and process flow documentation.

Implementation & Testing:

- Requirements gathering, design sessions, BPQ (Business Process Questionnaire), prototyping, user acceptance testing (UAT).
 - Leading data conversion efforts and performing system testing.
- Process Optimization:**
- Designing and implementing financial workflows.
 - Troubleshooting issues and escalating critical concerns to Infor support.
- Project Management:**
- Managing project timelines, leading cross-functional teams.
 - Working with offshore teams for technical support, patch installations, and data refreshes.
- Client Relationship Management:**
- Providing strategic advice and actionable insights.
 - Ensuring smooth communication during system implementations and post-go-live support.
- EDI & Purchasing:**
- Managing EDI processes and purchasing/inventory control systems.

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Financials Consultant

2021- Present

Responsibilities:

Kiran currently serves as a **Senior Infor Financials Consultant** at **Cendien**, where he provides audit and consulting services for clients using **Infor CloudSuite** and **Infor Lawson Finance modules**. He is involved in a range of projects, including the development of a **lockbox interface** with **automated cash application** and providing ongoing support for clients' **MRO operations**. His work focuses on optimizing **3-way matching** processes and **PO/invoice clean-up** to ensure financial accuracy and operational efficiency.

Audit and Consulting Services:

- Providing expert audit and consulting services for clients using Infor CloudSuite and Infor Lawson Finance modules.

Project Involvement:

- Developing a lockbox interface with automated cash application.
- Providing ongoing support for clients' Maintenance, Repair, and Operations (MRO) activities.

Process Optimization:

- Focusing on optimizing 3-way matching processes to ensure accuracy in financial transactions.
- Cleaning up purchase orders (PO) and invoices to enhance financial accuracy and operational efficiency.

Kiran's role is pivotal in ensuring that clients' financial processes are streamlined and efficient, contributing to their overall operational success.



Senior Infor CloudSuite FSM Consultant
Consultant: Kiran Chiluka

Hospitals
Lawson Consultant

2016 – 2021

During his tenure as a **Lawson Consultant**, Kiran provided comprehensive support to over 30 hospitals, specializing in the Infor CloudSuite and Infor Lawson ERP Finance module. His multifaceted role encompassed facilitating kick-off calls, gathering detailed requirements, and leading design sessions for both pre- and post-implementation activities. Kiran was pivotal in the development of BPQs (Business Process Questionnaires), prototyping, system testing, and the creation of extensive documentation for processes, reports, and training materials.

Kiran's expertise extended to reviewing and analyzing vendor legacy systems, where he provided tailored solutions to optimize financial processes such as **General Ledger, Accounts Payable, and Asset Management** for each client. He successfully implemented robust data conversion strategies, conducted thorough user acceptance testing, and designed seamless data flow integrations between Lawson and external systems like EPIC and Meditech.

In addition to these technical responsibilities, Kiran managed complex invoice approval workflows and delivered both on-site and remote support during the critical go-live phase and subsequent post-deployment activities. His proactive approach to troubleshooting, coupled with his ability to escalate and resolve critical issues efficiently, ensured a smooth transition for clients to the new system. Kiran's dedication and technical acumen were instrumental in enhancing the overall efficiency and effectiveness of the financial operations within the hospitals he supported.

Responsibilities

- **Supported Over 30 Hospitals:** Specialized in Infor CloudSuite and Infor Lawson ERP Finance module.
- **Facilitated Key Activities:**
 - Kick-off calls
 - Requirement gathering
 - Leading design sessions (pre- and post-implementation)
- **Developed and Tested:**
 - Business Process Questionnaires (BPQs)
 - Prototyping
 - System testing
 - Documentation for processes, reports, and training materials
- **Reviewed and Optimized Financial Processes:**
 - General Ledger
 - Accounts Payable
 - Asset Management
- **Implemented Data Conversion Strategies:** Ensured smooth data migration.
- **Conducted User Acceptance Testing:** Verified system functionality with end-users.
- **Designed Data Flow Integrations:** Integrated Lawson with EPIC and Meditech systems.
- **Managed Invoice Approval Workflows:** Handled complex approval processes.

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- **Provided Support:**
 - On-site and remote support during go-live and post-deployment phases
 - Proactive troubleshooting and issue resolution

Highlighted Skillsets

- **Project Management:** Leading design sessions, managing go-live and post-deployment activities.
- **Technical Expertise:** Infor CloudSuite, Infor Lawson ERP, data conversion, system integration.
- **Analytical Skills:** Reviewing legacy systems, optimizing financial processes.
- **Documentation and Training:** Creating comprehensive documentation and training materials.
- **Problem-Solving:** Proactive troubleshooting, critical issue escalation and resolution.
- **Communication:** Facilitating kick-off calls, gathering requirements, providing support.

Education

- Master of Business Administration (MBA) – Finance
- Certified Infor CloudSuite Professional
- Infor Lawson ERP Finance Module Certification
- Project Management Professional (PMP) – In Progress
- ScrumMaster Certification – Braintrust Consulting Group
- Lean/Six Sigma Greenbelt Certification – Lockheed-Martin Commercial Systems Engineering



Senior Infor Technology Architect
Consultant: Sethu Pathy

Professional Summary

Sethu is a highly accomplished Senior Principal **Infor Certified Consultant** with over 17 years of experience in implementing, integrating, and optimizing **enterprise applications across Finance, HR, and Data Analytics domains**. Throughout his career, he has significantly contributed to various industries by designing and executing complex solutions, including financial reporting, budgeting and planning, and seamless **application integrations**.

With extensive proficiency in Infor and other enterprise software solutions, Sethu has delivered comprehensive end-to-end solutions that align with business goals, enhance operational efficiency, and support data-driven decision-making. His deep knowledge of **business intelligence** tools and Enterprise Performance Management (EPM) solutions, such as Oracle EPM, Infor, TM1, and Anaplan, has been pivotal in his success.

Sethu has led numerous successful projects involving **large-scale system integrations**, application upgrades, and automation initiatives, showcasing his exceptional problem-solving and technical leadership skills. Additionally, he has developed expertise in **data management** platforms like Infor Data Lake and has been instrumental in creating and deploying data visualizations and reporting solutions that bolster business intelligence strategies.

Key Expertise Includes:

- **Business Reporting:** Infor Birst, Infor BI, Hyperion Financial Reporting, Crystal Reports
- **Budgeting and Planning:** Oracle EPM (Hyperion Planning, Essbase), TM1, Infor EPM, Anaplan
- **System Integration:** Infor ION, APIs, JavaScript
- **Cloud Technologies & Automation:** Azure, Office 365, Infor Coleman (AI)

Sethu's comprehensive skill set and extensive experience make him a valuable asset in driving enterprise application success and fostering data-driven business environments.

Relevant Skills

- **Business Reporting Tools:** Infor Birst, Infor BI, Hyperion Financial Reporting, Crystal Reports
- **EPM Solutions:** Oracle EPM (Hyperion Planning, Essbase), TM1, Infor EPM, Anaplan
- **System Integration & Data Management:** Infor ION, API, JavaScript, Infor Data Lake
- **Cloud Technologies & Automation:** Azure, Office 365, Infor Coleman AI
- **Reporting & Data Visualization:** Infor Birst, Infor BI
- **Programming Languages:** JavaScript, Perl, VB

Certifications:

- Oracle Essbase 11 Certified Implementation Specialist
- Official Anaplan Certification
- Fundamentals of Quantum Computing (The Linux Foundation)

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Senior Infor Technology Architect
Consultant: Sethu Pathy

Clients/Experiences

Cendien – Carrollton, TX

2021 - Present

Senior Infor Technology Architect

Responsibilities:

Sethu serves as an **Infor Technology Architect** at Cendien, where he leads the design and implementation of robust Budgeting and Planning solutions within the Infor EPM framework. He has driven several large-scale system integrations, ensuring that Infor applications are seamlessly integrated with third-party systems and other Infor modules, leveraging Infor ION and APIs. His work also extends to automating HR processes such as employee hiring, promotions, and terminations in the GHR (Global Human Resources) application using Azure and Office 365.

His accomplishments at Cendien include:

- Designing and implementing complex budgeting and planning solutions for Finance and HR departments.
- Leading the upgrade and validation of the EPM system.
- Designing data models to optimize the flow and consumption of business-critical data.
- Automating HR workflows and data transfers to improve operational efficiency.
- Leveraging Infor Coleman AI to streamline decision-making processes for business users.
- Developing Birst reports for key HR and business metrics, such as Employee Training, Performance Appraisals, and Salary Reports.
- Implementing Workforce Management (WFM) integrations to ensure accurate and timely data sharing between HR, WFM, and EPM systems.

Sethu has also played a critical role in integrating Infor Data Lake with other enterprise systems, ensuring that data is transferred efficiently and securely across platforms.

Leading Pharmaceutical Company – Chicago, IL, USA

Senior EPM Consultant

At this leading pharmaceutical company, Sethu was responsible for transforming business requirements into actionable technical designs and managing the end-to-end implementation of complex planning applications using Cognos TM1. His focus was on developing solutions to address business pain points while ensuring that the applications were scalable and efficient.

Responsibilities:

- Led the design and development of planning applications tailored to specific business needs.
- Managed the full lifecycle of Cognos TM1 applications, from planning to deployment.
- Conducted testing, user acceptance testing (UAT), and post-deployment support.
- Collaborated with business teams to provide strategic insights and long-term technical solutions.

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Leading Electrical Manufacturing Company – Memphis, TN, USA**Senior EPM Consultant**

At this leading electrical manufacturer, Sethu managed the upgrade and integration of Hyperion applications and was integral in streamlining the data load processes for financial systems. He played a key role in the upgrade from Hyperion v9.3 to v11.1.2.4, ensuring minimal disruption to business operations.

Responsibilities:

- Led the upgrade and customization of Hyperion applications to align with business needs.
- Designed and implemented data load processes using FDMEE.
- Automated metadata loading and enhanced financial reporting functionality.
- Created custom scripts and automation tools to streamline system maintenance and reporting.

Leading Pharmaceutical Company – Thousand Oaks, CA, USA**Senior EPM Consultant**

Sethu contributed to multiple key projects at this pharmaceutical company, focusing on metadata management, system upgrades, and performance tuning. He worked closely with business teams to ensure Hyperion applications were tailored to meet both technical and functional requirements.

Responsibilities:

- Led the implementation of system enhancements and metadata management strategies.
- Automated data load and metadata load processes using DRM and FDMEE.
- Conducted performance tuning to optimize data processing times.
- Developed disaster recovery strategies to ensure data integrity and minimize downtime during critical periods.

Leading Pharmaceutical Company – Macclesfield, UK**Senior EPM Consultant**

During his time in the UK, Sethu led a team that supported and upgraded the Hyperion suite of applications. His role involved analyzing business requirements, designing technical solutions, and providing ongoing support for the Hyperion suite, ensuring that it met evolving business needs.

Responsibilities:

- Managed the upgrade process for Hyperion applications.
- Designed and implemented metadata and data load processes.
- Worked closely with business stakeholders to gather requirements and deliver enhancements.
- Provided ongoing support and troubleshooting for the Hyperion applications.

Fried Chicken Restaurant – Chennai, India**Essbase Support Specialist**

In this role, Sethu was responsible for monitoring and optimizing the Essbase application, ensuring smooth data integration from Lawson ERP and performing regular system updates and troubleshooting. His ability to automate



Senior Infor Technology Architect
Consultant: Sethu Pathy

processes and improve system performance was instrumental in reducing manual efforts and improving operational efficiency.

Responsibilities:

- Monitored data load processes and ensured timely data transfers.
- Automated data and dimension loads using Essbase rule files and JavaScript.
- Worked closely with the client's IT and financial teams to resolve technical issues.

Unisys Systems – Liverpool, UK

Data Migration Developer

Sethu played a key role in the migration of data between legacy systems and new enterprise applications. He prepared mapping documents, developed migration scripts, and supported the project through testing and deployment phases. His work ensured a smooth transition of data, minimizing system downtime and business disruption.

Responsibilities:

- Developed data migration scripts and validation processes.
- Collaborated with project teams to address technical issues and improve data flow.
- Supported user acceptance testing and system deployment.



Senior Infor Birst Technical Architect
Consultant: Keerthy Jayavelu

Professional Summary

Keerthy is a **highly skilled and results-driven** technologist with over six years of progressive experience in the **Business Intelligence (BI) and Data Warehousing** domains. He is an **Infor Certified Birst Developer and Microsoft Certified Power BI Professional**, bringing a comprehensive understanding of the BI lifecycle—from reporting and data visualization to data modeling, ETL, and OLAP tools. Keerthy has an exceptional track record in delivering end-to-end BI solutions across multiple industries, with expertise in dimensional modeling, database design, and the development of scalable, high-performance BI systems.

Keerthy has significantly contributed to the **development and implementation of Business Intelligence solutions**, demonstrating proficiency in all stages of the **software development lifecycle (SDLC)**, including presales, requirement gathering, architecture, design, implementation, and testing. His experience includes representing his company in Dubai for **Power BI and Birst BI tool** presales during new project kick-offs, where his deep technical expertise was instrumental in securing and successfully implementing projects.

Keerthy's expertise spans a wide range of **BI tools**, including **Birst, Power BI, and Microsoft SQL Server**. His ability to create data-driven insights and deliver customized BI solutions has earned him recognition and awards, including the prestigious **"Employee Empowerment"** title for his technical proficiency. His strategic approach and technical acumen make him an asset in driving business intelligence initiatives that enhance operational efficiency and support data-driven decision-making.

Relevant Skills

- **Business Intelligence & Data Warehousing:** Birst, Microsoft Power BI, Data Analysis, Data Visualization, Data Warehousing, ETL
- **Reporting & Analytics:** Reporting & Analysis, KPIs, Scorecards, Dashboards, BEx Reporting
- **Technologies & Tools:** Birst, Power BI, Microsoft SQL Server, M3 Analytics, ION Desk, Data Fabric, Compass, Infor Datalake
- **Programming & Scripting:** DAX, M Query, BQL, ETL functions (Map, List, Variables, Transpose, etc.)
- **Process & Methodologies:** Dimensional Modeling, Database Design, Data Integration, Metadata Publisher, Orchestration Workflows

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Consultant

2022 - Present

Responsibilities:

Keerthy serves as a Senior Infor Consultant, specializing in migrating clients from legacy systems (v10 shared services model) to the cloud. He is adept at setting up spaces in various tenant environments (TST, TRN, PRD) and

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Senior Infor Birst Technical Architect
Consultant: Keerthy Jayavelu

creating custom models to meet specific client requirements. His responsibilities include importing and transforming data from M3 Applications to M3 Analytics using Birst, configuring data flows in ION Desk, and ensuring the accuracy and validation of results via Data Fabric and Compass. Additionally, he leads orchestration workflows to facilitate data import and publishing from Data Lake to Birst Warehouse.

Infor

Sep 2021 – 2022

Senior Business Intelligence Consultant

Responsibilities:

As a Senior BI Consultant at Infor, Keerthy has played a crucial role in developing and designing data models tailored to client specifications. His work spans across Infor's EAM, SCM, and XM (Expense Management) solutions, where he has designed and delivered complex reports and dashboards. In addition to his development work, Keerthy has been actively involved in presales for Power BI and Birst BI tools, providing expert insights and helping clients define their BI strategy.

Accenture

Jun 2020 – Aug 2021

Senior Analyst

Responsibilities:

In his role as Senior Analyst, Keerthy was responsible for leading end-to-end implementations in the Enterprise Asset Management (EAM) module. He worked with Infor Mingle and ION for data extraction, load, and connectivity through Infor Datalake. Keerthy managed administrative functions, such as groups, custom measures, attributes, and aggregates. He also implemented complex data loads in Birst, leveraging variables and filter conditions to optimize reporting and performance.

Gain Insights Solutions

Jan 2016 – Jun 2020

Business Intelligence Consultant

Responsibilities:

Keerthy served as a Business Intelligence Consultant and Team Lead at Gain Insights Solutions, a global consulting firm specializing in data analytics and serverless solutions. He collaborated closely with solution architects and functional analysts to design and deliver solutions that met the unique requirements of clients. He led the implementation of Birst BI and Power BI solutions, including presales in the Gulf market, particularly in Dubai. Keerthy demonstrated deep expertise in DAX expressions, M Query, and data modeling, creating robust operational reports and forecast models for clients in diverse industries.

Key Achievements:

- Successfully led the migration of multiple clients to the cloud, optimizing their BI and data warehousing solutions.
- Awarded "Employee Empowerment" title for exemplary technical expertise and contributions to project success.

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Senior Infor Birst Technical Architect
Consultant: Keerthy Jayavelu

- Played a pivotal role in presales and new project implementations, demonstrating the value of BI tools like Power BI and Birst in enterprise environments.
- Extensive experience across BI lifecycle, from initial requirement gathering to post-implementation support.

Education

- **Bachelor of Engineering, Electronics and Communication Mahendra Institute of Technology, 2010 – 2014**

Certifications

- Infor Certified Birst Administrator v7.5
[Certification Link](#)
- Infor Certified Birst Analyst v7.6
[Certification Link](#)
- Analyzing and Visualizing Data with Microsoft Power BI
Microsoft | Valid Certificate ID: 68007dc936a747b89edbf37e6a30e8cf



Senior Infor Technical Consultant
Consultant: Lakshmi Damerla

Professional Summary

Lakshmi is a seasoned **Infor Technical ERP Consultant** with over 20 years of comprehensive experience in the analysis, design, **development, testing, implementation, and maintenance** of complex client-server systems. She has demonstrated expertise across a wide range of industries, including healthcare, automotive, retail, manufacturing, and fertilizer, with a specialized focus on **Infor Lawson** and **PeopleSoft applications**. Lakshmi's deep technical proficiency spans **system administration, integration, data conversions**, and custom software development, both remotely and on-site. She has managed numerous high impact consulting projects, traveling extensively to client sites to ensure successful system implementations, maintain client satisfaction, and oversee deliverables.

Known for her ability to transform complex **technical requirements into efficient, scalable solutions**, Lakshmi has consistently delivered high-quality results through detailed analysis, coding, and testing. Her vast expertise extends to Lawson's Financials, Human Resources, Procurement, and Crystal Reports, as well as Oracle PeopleSoft's supply chain management. Lakshmi's strategic approach to application development, process flows, and data migration has enabled organizations to seamlessly transition to advanced ERP systems, optimizing operational performance across business functions.

Relevant Skills

ERP Expertise:

- Infor Lawson Software (Human Resources, Financials, Procurement, and Payroll)
- Oracle PeopleSoft (Procure-to-Pay, Inventory Management, Supplier Contracts)
- System Integration and Custom Software Development
- Lawson Process Flows, Smart Notifications, SEA (Self-Evident Applications)

Programming & Technologies:

- Java, COBOL, R Programming, Oracle, SQL Server, PostgreSQL, Toad Data Point
- Crystal Reports, PeopleTools, PSQuery, XML, HTML, CASE Tools
- Application Development and Maintenance, Data Cleansing and Conversion
- Process Automation and Workflow Optimization

Areas of Expertise:

- Data Migration & Conversion (Lawson to PeopleSoft, Financial Systems)
- System Administration and Application Support
- Database Design, Data Analysis, and Reporting
- Requirements Gathering, Technical Specification Development, and Testing
- User Training and Documentation

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Senior Infor Technical Consultant
Consultant: Lakshmi Damerla

Clients/Experiences

Cendien – Carrollton, TX

08/2019 - Present

Senior Infor Lawson Consultant

Lakshmi is currently working as a **Senior Infor Lawson Consultant**, managing multiple clients in the healthcare and public sector. Her core responsibilities include overseeing the **conversion of financial and procurement data** from Lawson to Munis, managing data extraction and integration, and ensuring seamless transitions of complex financial and personnel records. Lakshmi also **codes and tests interfaces and processes related to payroll deductions**, automating the AR payment interface, and optimizing data flow automation using Lawson's pre-processor and IPA functions. She is integral to the QA and validation process for all data conversions, ensuring accuracy and data integrity across client systems.

Responsibilities:

- Managed multiple clients in healthcare and public sectors.
- Oversaw conversion of financial and procurement data from Lawson to Munis.
- Automated AR payment interface and optimized data flow automation using Lawson's pre-processor and IPA functions.
- Integral to the QA and validation process for all data conversions, ensuring accuracy and data integrity across client systems.

Independent Consultant – Various Clients

07/2015 – 04/2018

Senior Infor Lawson Consultant

Responsibilities:

During this period, Lakshmi worked as an independent consultant for multiple hospital systems, where she was responsible for converting procurement and supply chain data from Lawson to PeopleSoft. This involved cleansing and reconciling large volumes of legacy data, ensuring compliance with the new system's item and contract master. Lakshmi also developed and executed data migrations, handled ad-hoc reporting, and resolved discrepancies in inventory, vendors, and purchase orders to ensure smooth system integration. Her work included comprehensive data validation and ongoing monitoring of system health post-implementation.

Independent Consultant – Major Hospital Chain

07/2015 – 07/2015

Senior PeopleSoft / Infor Consultant

Responsibilities:

Lakshmi worked with a large hospital chain, focusing on the data cleansing and migration of master data, including items, vendors, and contracts, from PeopleSoft to an integrated ERP system. Her role included developing the technical specifications for conversion processes, testing the migrated data for accuracy, and ensuring the integrity of the new system post-migration.



Senior Infor Technical Consultant
Consultant: Lakshmi Damerla

Independent Consultant – Major Energy Company
Senior Infor Lawson Consultant

12/2007 – 03/2010

Responsibilities:

At this energy company, Lakshmi led the upgrade of Lawson from version 8.1 to 9.0, handling the integration and installation of several Lawson modules, including financials, procurement, and PSA. She was involved in the development of automated time entry notifications, process flows for requisition approvals, and the installation of Lawson's recruiting system. Lakshmi also provided support for the configuration of requisition approvals and employee onboarding processes.

Independent Consultant – Various Projects
Senior Consultant (Multiple Industries)

2004 – 2007

Responsibilities:

Lakshmi worked across various sectors, including healthcare, steel, and oil & gas, performing ERP system customizations, upgrades, and integrations. Key projects included database triggers for synchronization between Lawson and Maximo for a steel company, developing custom programs for the oil and gas sector, and performing critical upgrades to Lawson systems for hospitals. She also provided system support, troubleshooting, and data migration strategies.

Compuware Corporation
Senior Infor Lawson Technical Administrator

1999 – 2002

Responsibilities:

At Compuware, Lakshmi led the analysis, design, and programming for several major Lawson implementations. She worked on multiple data integrations, including financial systems and healthcare procurement, and developed custom reports for a national healthcare facility. She was also responsible for preparing proposals, implementing quality assurance methodologies, and training clients on Lawson software best practices.

Key Achievements

- Led multiple data migrations and ERP implementations for healthcare, energy, and retail sectors, ensuring smooth transitions and system integrations.
- Streamlined procurement processes by developing and implementing process flows, improving efficiency and reducing bottlenecks.
- Provided high-level system support and troubleshooting, including critical data clean-up and process optimization.
- Managed large-scale, complex projects, delivering solutions on time and within budget while maintaining high client satisfaction.



Senior Infor Technical Consultant
Consultant: Lakshmi Damerla

Education

MCA (Master of Computer Applications - University of Madras, India
B.S. in Physics - University of Madras, India

Related Education

- Introductory, Intermediate, and Advanced Java
Austin Community College, Austin, Texas
- Crash Course in Java
Software Quality Institute, University of Texas at Austin
- Introductory C++
Austin Community College, Austin, Texas
- Lawson Human Resources/Payroll 7.0
Software Consulting University, Compuware Corporation
- SEA Lawson Internet Products
Software Consulting University, Compuware Corporation
- Statistical Data Analysis
Johns Hopkins University Online



Senior Infor BI and Birst Consultant
Consultant: Yohan Dole

Professional Summary

Yohan is a highly experienced **Senior Infor Consultant** with over 15 years of expertise in **Business Intelligence (BI)**, **Infor Systems**, and **Infor ERP Applications**. He possesses an extensive background in Infor BI tools, including **Lawson Business Process Warehouse (BPW)**, **Infor ION**, **Birst**, and **Infor DEPM**. Yohan has collaborated with diverse industries such as fashion, healthcare, food & beverage, call centers, and the public sector. His deep technical knowledge, complemented by strong business acumen, enables him to deliver tailored BI solutions that drive operational efficiency, improve decision-making, and support enterprise-level transformations.

Expanded Expertise and Roles

- **Infor BI Tools:** Proficient in Lawson Business Process Warehouse (BPW), Infor ION, Birst, and Infor DEPM.
- **Industry Experience:** Extensive work with fashion, healthcare, food & beverage, call centers, and the public sector.
- **Technical and Business Acumen:** Combines deep technical knowledge with strong business insights to deliver impactful BI solutions.

Key Strengths

- **Implementation and Consulting:** Proven track record in both implementation and consulting roles, ensuring successful project outcomes.
- **Business Needs Analysis:** Expert in analyzing business requirements and designing technical solutions that meet client needs.
- **Team Leadership:** Demonstrated leadership in managing cross-functional teams and building strong client relationships.
- **Software Development Life Cycle (SDLC):** Proficient in the full SDLC, ensuring comprehensive project management.
- **Agile Methodologies:** Expertise in agile methodologies, ensuring projects are delivered on time and within budget.

Achievements

- **Operational Efficiency:** Delivered tailored BI solutions that significantly enhance operational efficiency.
- **Decision-Making Support:** Improved decision-making processes through effective BI system implementations.
- **Enterprise-Level Transformations:** Supported large-scale transformations with customized BI solutions.

Relevant Skills

Infor Technologies

- **Infor Business Intelligence (BI):** Expertise in Lawson Business Process Warehouse (BPW), Infor ION, Infor BI, Infor DEPM, Birst, and related reporting tools.
- **Infor Suite Tools:** Lawson Business Intelligence (LBI), Data Warehouse Designer, OLAP Server/Administration, Application Studio, Office Plus, Import Master, and Birst Configuration.

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Senior Infor BI and Birst Consultant
Consultant: Yohan Dole

- **Infor Modules:** Extensive experience with Infor M3, Infor ION Integration, and Infor Cloud Suite (Fashion and Finance Analytics).
- **Data Modeling & Management:** Proficient in designing multidimensional models, implementing data marts, and setting up ETL processes for complex data environments.

Tools & Technologies

- **Microsoft BI:** SQL Server (SSIS, SSAS), Power BI, SQL Server Replication, Microsoft .NET Framework.
- **SAP BW/BI:** Expertise in SAP BW, ABAP, ALV/Smart Forms, SAP Query/SAP Scripts, BAPI/BADI/User Exits/Enhancement Points.
- **IBM Cognos 8/10:** Framework Manager, Report Studio, Transformer, Event Studio, Analysis Studio, and Power Play Studio.
- **ETL Tools:** Experience with SSIS, BCP (Bulk Copy Program), and various data integration platforms.

Industry Expertise

- **Fashion & Retail:** Experience working with fashion retailers, including implementing Infor BI and M3 Analytics for inventory, sales, and financial reporting.
- **Healthcare:** Specialized in implementing healthcare analytics and business intelligence solutions in large academic medical centers and healthcare providers.
- **Food & Beverage:** Delivered data-driven solutions for F&B manufacturers, improving operational visibility and performance metrics.
- **Call Center & BPO:** Implemented BI solutions to optimize performance, quality assurance, and operational compliance in call center environments.
- **Public Sector:** Worked with government agencies to transition from manual reporting systems to automated BI platforms.

Project Management & Methodologies

- **Project Leadership:** Led multiple teams of consultants and managed projects across diverse industries, ensuring adherence to project timelines, budgets, and specifications.
- **Agile & Waterfall Methodologies:** Proficient in managing projects using both Agile and Waterfall methodologies, ensuring adaptability to client needs and project scope.
- **Business Analysis:** Strong ability to gather and document business requirements, transform them into technical specifications, and create robust solutions that meet client expectations.

Core Competencies

- **Data Analysis & Reporting:** Advanced skills in data analysis, visualization, and building interactive dashboards to support business decision-making.
- **Database Management:** Expertise in managing databases, including designing, deploying, and maintaining data warehouses.
- **Client Relationship Management:** Proven ability to build and maintain long-term relationships with clients, offering strategic advice and ensuring successful project delivery.
- **Continuous Learning:** A passion for ongoing professional development, keeping up to date with the latest BI technologies, certifications, and industry trends.

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Senior Infor BI and Birst Consultant
Consultant: Yohan Dole

Clients/Experiences

Cendien Consulting – Dallas / Philippines
Senior Lead Infor BI / DEPM Consultant
(Globe Life / Various Clients)

2020- Present

At Globe Life, Yohan provided critical support for Infor IBI, resolving various system issues to enhance performance and reliability. He designed and developed GL DEPM Data Warehouse Designer Vaults, contributing to a robust data management infrastructure. Additionally, Yohan created various dashboards to provide actionable insights and trained client personnel to effectively utilize these tools, ensuring they could leverage the full capabilities of the system.

Responsibilities:

- **Provided Support for Infor IBI:** Assisted Globe Life with various support issues related to Infor IBI, ensuring smooth and efficient system operations.
- **System Issue Resolution:** Helped resolve multiple issues within the current systems, enhancing overall system performance and reliability.
- **Data Warehouse Design and Development:** Designed and developed GL DEPM Data Warehouse Designer Vaults, contributing to the robust data management infrastructure.
- **Dashboard Creation and Training:** Created various dashboards to provide actionable insights and trained client personnel to effectively use these tools, ensuring they could leverage the full capabilities of the system.

DWS Ltd – Home Start Finance – Adelaide Australia
Senior Consultant – Data Engineering

10/2022

Yohan was requested to help modernize the existing Enterprise Data Warehouse by introducing unique identifiers for entities, which enhanced data organization and retrieval efficiency. He implemented data masking techniques to ensure data security and compliance with audit requirements, protecting sensitive information from unauthorized access. Additionally, Yohan de-identified data to meet audit standards, ensuring that personal information was anonymized while maintaining the integrity and usability of the data for analytical purposes.

Responsibilities:

- Requirement gathering and analysis.
- Solution architecture to modernize the existing Data Warehouse with new features.
- Introduce BI Best Practices
- Define Conceptual and Physical Design
- Technical specifications and Solution Architecture
- Replace existing integration packages for new source systems.
- Add new SSIS packages for new data sources.
- Define Data Dictionary and Data Catalog
- Implement Business Intelligence Best Practices by introducing Surrogate key concept.
- Document AS-IS business process.

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- Modernize the existing Data Warehouse by introducing features such as Data Masking, Data De-identification, and introduction to Home Start Finance Unique Identities for Business Entities
- Improved ETL Processes by optimizing existing Jobs and Stored Procedures
- Introduced Data Quality checks and exception handling.
- Implement Azure Dev-Ops and migrate the Source code from TFS to GIT
- Introducing new Environments for BAU vs Projects.
- Lead a team of 5 Consultants on implementation.
- Train and guide consultants from Home Start Finance team.

Dialog IT –SA WATER – Adelaide Australia
Consultant – Data Engineering

06/2022 – 09/2022

Yohan played a crucial role in integrating multiple source systems and consolidating data into the Enterprise Data Warehouse using SQL Server Integration Services (SSIS). His responsibilities included designing and developing SSIS packages to facilitate seamless integration between various source systems and the data warehouse. He converted existing integration services packages from full extraction to delta extraction, significantly improving efficiency.

Yohan devised strategies for the initial data load of large source tables, ensuring a smooth and efficient process. He also mentored and guided Dialog IT consultants on SSIS and Power BI, sharing his expertise to enhance their skills. By implementing delta extraction strategies, Yohan reduced the execution time of SQL Server agent jobs to under an hour. Additionally, he utilized the Bulk Copy Program (BCP) utility to import large data sets into the data warehouse more quickly, further optimizing the data integration process.

Responsibilities:

- Design and Develop SSIS Packages for integration between multiple sources systems to the Enterprise Data Warehouse
- Convert existing integration services packages from full extraction to Delta extraction.
- Come up with strategies for bringing in initial data load for large source tables.
- Mentor and guide Dialog IT consultants on SSIS and Power BI
- Reduced the time taken to execute SQL Server agent jobs under an hour by implementing delta extraction strategies.
- Using BCP (Bulk Copy Program) utility was able to bring in large data sets into the Data warehouse in a shorter time frame.

Department of Treasury and Finance – Adelaide Australia
Power BI Consultant

03/2022 – 05/2022

Yohan was instrumental in transitioning the Department of Treasury and Finance from a manual reporting solution to an automated solution using Power BI. His responsibilities included:

- **Design and Development:** Created procurement dashboards for activities and contracts in Power BI, enhancing data visualization and accessibility.



Senior Infor BI and Birst Consultant
Consultant: Yohan Dole

- **Technical Specifications and Architecture:** Designed and documented technical specifications and architecture to ensure a robust and scalable solution.
- **Training:** Trained the DTF internal team on Power BI Desktop and Power BI Service, empowering them to develop and manage their own dashboards.
- **Data Warehouse Initiation:** Initiated the setup of an in-house data warehouse to centralize and streamline data management.
- **Mentorship:** Provided comprehensive training on BI tools and technologies, enabling the internal team to independently develop Power BI dashboards.
- **Automation:** Facilitated the shift from manual reporting to an automated approach, significantly improving efficiency and accuracy.

Contact Center and BPO – Philippines

2020

Senior Lead Infor BI Consultant - Infor BI/Birst Reporting Solution

Yohan played a key role in transforming the reporting processes for a high-performing Contact Center and BPO by converting manual reports into Infor BI and creating analytical dashboards in Birst. His responsibilities included:

- **Design and Implementation:** Developed and implemented comprehensive Infor BI and Birst solutions to streamline reporting processes.
- **Reporting Strategy and UI Design:** Defined the reporting strategy and performed report and UI design to enhance user experience and data accessibility.
- **Dashboard Implementation:** Created management dashboards and standard reports to provide actionable insights.
- **Customer Relationship Management:** Built and maintained positive relationships with customers, ensuring their needs were met and expectations exceeded.
- **Business Process Improvement:** Consulted with customers to identify and implement business process improvements.
- **Testing and Deployment:** Assisted clients in executing testing phases and preparing for deployment readiness.
- **Report Development:** Designed and developed reports related to performance scorecards, quality, operational metrics, and compliance dashboards.
- **Training Delivery:** Provided training on various tools including Application Studio & Office Plus, Self-Service, Dashboards, Import Master, SSIS, Data Warehouse Designer, and Birst.
- **Setup and Support:** Managed Infor Birst setup and configuration, troubleshooting, and support issues to ensure smooth operation.

Food Manufacturing Company – Australia

2019

Lead BI Consultant - Infor BI Reporting Solutions & Infor ION

Yohan played a pivotal role in helping a food manufacturing company transition to Infor BI and implement ION approval workflows after their adoption of Infor M3. Yohan's contributions significantly improved the company's

reporting capabilities and workflow efficiency, supporting their operational goals and enhancing overall productivity. His responsibilities included:

Report Design and Development:

- Created a **Material Staging Report** based on date and manufacturing orders to streamline production processes.
- Developed a **Recipe Sheet** to ensure accurate and efficient recipe management.

ION Document Flows:

- Designed and implemented **Purchase Order Approval Workflows** to automate and streamline the approval process.
- Integrated and consumed **Web Services** to enhance system interoperability.
- Utilized **ION APIs and REST Services** to facilitate seamless data exchange and integration.
- Set up **Ming.le Mobile Notifications** to ensure timely updates and alerts for stakeholders.

Fashion Retail in a Box – Australia

2019

Lead Consultant - Infor BI Reporting Solutions & Infor ION

Fashion Retail-in-a-box, a fully-functioning, pre-configured, scalable Enterprise Solution aimed at small and medium fashion retail businesses/merchants and entrepreneurs.

Responsibilities:

- Install and configure M3 Analytics Fashion for: Sales, Finance, Procurement, Production
- Design and develop Retail Specific Dashboards
- Global inventory view – Enable users to view data that is scattered across various locations up on one master dashboard to analyze and overlook revenue/ supply and demand/ item SKU/ distribution/ etc.
- Sales summery – Displays real-time sales statistics across multiple sales points on one dashboard allowing users to make important sales decisions for the business
- Store performance – A store-specific feature that allow users analyze data according to style or price and analyze product-wise revenue

Footwear Company – Ohio

2019

Senior Lead Infor M3 Consultant

Designs, develops, manufactures and markets outdoor, work, western footwear. Company is implementing Infor M3 Cloud Suite for Fashion and in the process of implementing Cloud Suite Birst for Fashion.

Responsibilities:

- Install and Configure Cloud Suite Fashion Analytics for: Sales, Finance, Procurement, Production
- Define the reporting strategy, and perform report, and UI Design
- Create and maintain positive customer relationships

- Consult with customers on business process improvements
- Help clients successfully execute testing and move to deployment readiness

Fashion Company New Jersey, USA

2018

Senior Lead Infor BI Reporting Consultant – Infor BI Reporting Solution

Implemented Infor Cloud Suite Financials and D/EPM and wanted to create financial reports in D/EPM. A fashion group focused on men's clothing and casual clothing such as Galaxy and Beanpole. The Group Implemented Infor M3 and wanted to convert their existing reports into Infor BI.

Responsibilities:

- Design and develop financial reports using Application Studio V12: Balance Sheet, Income Statement, Rolling 13-month Summary
- Install and configure Infor M3 Analytics for: Sales, Finance, Procurement, Production
- Design and implement Infor BI Solutions
- Define the reporting strategy, and perform report, and UI Design
- Create and maintain positive customer relationships
- Consult with customers on business process improvements
- Help clients successfully execute testing and move to deployment readiness
- Design and develop reports related to Sales, Finance, Manufacturing, and Inventory

Dairy Company - Australia

2017

Infor BI Reporting Solution

Senior Infor BI / DEPM / Infor M3 Consultant

The dairy company Implemented Infor M3 and wanted to convert their existing Cognos based BI solution into Infor BI.

Responsibilities:

- Design and implement Infor BI Solutions
- Define the reporting strategy, and perform report, and UI Design
- Implement Management Dashboards and Standard reports
- Create and maintain positive customer relationships
- Consult with customers on business process improvements
- Help clients successfully execute testing and move to deployment readiness
- Design and develop reports related to Sales, Finance, Manufacturing, and Inventory
- Deliver training on:
 - Application Studio & Office Plus
 - Self-service Dashboards

Largest Wood-based Panel Products Distributor - Australia
Senior Infor BI Consultant – Infor BI M3 Analytics**2018**

The distributor company implemented InforM3 and wanted M3 Analytics for distribution set up of their business.

Responsibilities:

- Design and implement Infor BI Solutions
- Define the reporting strategy, and perform report, and UI Design
- Implement Management Dashboards and Standard reports
- Create and maintain positive customer relationships
- Consult with customers on business process improvements
- Help clients successfully execute testing and move to deployment readiness
- Design and develop reports related to Sales, Finance, Manufacturing, and Inventory
- Deliver training on
 - Application Studio & Office Plus
 - Self-service Dashboards

Leading University-Based Medical Center – Chicago, USA
Senior BI Consultant – Infor BI & BPW Implementation**2017**

Implement Healthcare Analytics for a leading university-based 664-bed academic medical center that includes hospital facilities for adults and children.

Responsibilities:

- Deliver training on the following areas:
 - Infor BI (Application Studio, Office Plus, Repository Administration, Self-service Dashboards)
 - BPW (Creating Dimensions, Creating Facts, Creating DataMart's and Data warehouse, Set up ETL and schedule jobs)
 - SSIS/SSAS
- Implement Healthcare Analytics - Version 10.0.1.4
 - Financial Management (General Ledger Cube, Payables Cube, Strategic Management Cube)
 - Supply Chain Management (Inventory Cube, Requisitions Cube, Buyer-Supplier Cube, Spend Cube)
- Design and develop a Manager dashboard

Private Research University – LA, USA
Senior Infor BI Consultant – Infor BI & BPW Implementation**2017**

Implement Healthcare Analytics for University Healthcare Organization.

Responsibilities:

- Deliver training on the following areas:
- Infor BI (Application Studio, Office Plus, Repository Administration, Self-service Dashboards)

- BPW (Creating Dimensions, Creating Facts, Creating DataMart's and Data warehouse)
- Set up ETL and schedule jobs) SSIS/SSAS
- Implement Healthcare Analytics - Version 10.0.1.4
 - Financial Management Cubes (General Ledger, Payables, Strategic Management)
 - Supply Chain Management Cubes (Inventory, Requisitions, Buyer-Supplier, Spend)
- Create Custom reports replacing spreadsheet-based solution

Infor Training - Dubai

2016

Senior BI Consultant - Infor BI & BPW Implementation

Deliver Infor BI training to Infor partners.

Responsibilities:

- Deliver training on the following areas:
 - Infor BI (Application Studio, Office Plus, Repository Administration, Self-service Dashboards)

Leading Operator of Surgical Facilities and Ancillary Services - USA

2016

Infor BI Consultant

Implement Infor BI with Infor BPW for the surgical faculty of a leading operator of surgical facilities and ancillary services with more than 180 locations.

Responsibilities:

- Deliver Training on the following areas:
 - BPW (Creating Dimensions, Creating Facts, Creating DataMart's and Data warehouse, Set up ETL and schedule jobs)
 - SSIS/SSAS
- Implement Healthcare Analytics - Version 10.0.1.4
 - Financial Management (General Ledger Cube, Payables Cube, Strategic Management Cube)

University Healthcare Facility - USA

2016

Infor BI & BPW Implementation

Infor BI Consultant

The award-winning client required to implement Infor BI and with Infor BPW solutions.

Responsibilities:

- Deliver Training on the following areas:
 - Infor BI (Application Studio, Office Plus, Repository Administration, Self-service Dashboards)
 - BPW (Creating Dimensions, Creating Facts, Creating DataMart's and Data warehouse, Set up ETL and schedule jobs)
 - SSIS/SSAS

- Implement Healthcare Analytics - Version 10.0.1.4
 - Financial Management (General Ledger Cube, Payables Cube, Strategic Management Cube)
 - Supply Chain Management (Inventory Cube, Requisitions Cube, Buyer-Supplier Cube, Spend Cube)
- Create Custom reports and Dashboards to replacing spreadsheet-based solution
- Create dynamic dashboards including interactive widgets, drill-downs, and slicing & dicing

Leading Healthcare Provider - IL & IA, USA
Infor BI Consultant – Infor BI & BPW Implementation

2016

The largest non-profit health system in the US. A team of professionals coordinating care between doctors, hospitals and care at home to over 4 million patients across 9 regions. The client required Infor BI and BPW solutions.

Responsibilities:

- Deliver Training on the following areas:
 - Infor BI (Application Studio, Office Plus, Repository Administration, Self-service Dashboards)
 - BPW (Creating Dimensions, Creating Facts, Creating DataMart's and Data warehouse, Set up ETL and schedule jobs)
 - SSIS/SSAS
- Implement Healthcare Analytics - Version 10.0.1.4
 - Financial Management (General Ledger Cube, Payables Cube, Strategic Management Cube)
 - Supply Chain Management (Inventory Cube, Requisitions Cube, Buyer-Supplier Cube, Spend Cube)
 - Human Chain Management (Human Capital Management Cube, Productivity Cube, Staffing Effectiveness Cube, Employee Health, and Safety Cube)

Sportswear Company - North Carolina, USA
BI Consultant

2015

Badger Sportswear is a privately held company located in Statesville, North Carolina which manufactures and markets the Badger Sports Brand. The line consists of performance tops and bottoms, fashion activewear and t-shirts, sweatshirts, jerseys, henleys, mesh tops and bottoms, wind wear, outerwear, and team uniforms for most major sports.

Responsibilities:

- Design Data source definitions for different types of data sources and legacy systems using BPW
- Set up Dimensions and Fact tables and set up the BPW Data warehouse
- Set up ETL and schedule jobs
- Create Purchase order analysis cube using Infor BI and SQL Server Analysis Services
- Implement Data Analysis capabilities using Microsoft Excel
- Create reports using Infor BI Application Studio
- Design and Develop Infor BI Dashboards
- Data Analysis capabilities using Infor BI Office Plus

- Create and deploy user-defined reports using Office Plus

Pioneer in Animal Nutrition and Feed Milling - Malaysia
Consultant

2014

One of the largest privately-owned agribusinesses in the region employing 2,400 people throughout 22 production facilities, across 10 countries, with a milling capacity of approximately 2.5 million tonnes per year. Gold Coin offers a wide range of products for both the Livestock and the Aqua industries, including young animals and hatchery feed, premixes, concentrates and compound feed.

Responsibilities:

- Design, develop and deploy BI solution for data integration to d/EPM.
- Data Extraction, Transformation, and scheduling using SSIS and SQL Server agent
- Extract data from legacy systems using a .NET-based Data Extraction solution

Textures Jersey - Sri Lanka
Consultant

2013

Renowned for producing superior quality knit fabrics, Textured Jersey is a Public Limited Liability company with two of the best brands in the industry as major shareholders, Pacific Textiles and Brandix Lanka.

Responsibilities:

- Design and develop Data warehouse for multi-dimensional modeling
- Create OLAP cubes for Departmental KPIs (Key Performance Indicators) using SQL Server Analysis Services
- Design and develop dashboards for analysis and decision making for key users
- Design and develop dashboards which support mobile applications

Education

Bachelor of Science in Information Technology – Sri Lanka Institute of Information Technology (2010)
MBA in Project Management – Cardiff Metropolitan University (Ongoing)

Certifications

- Sun Certified Java Programmer (SCJP)
- Microsoft Certified Solutions Associate (MCSA) – SQL Server 2012
- Microsoft Certified Solutions Associate (MCSA) – BI Reporting
- Microsoft Certified Analyzing and Visualizing Data with Power BI
- Microsoft Certified Azure Fundamentals
- Infor ION Suite Certified
- Infor ION Business Vault Certified (Support, Presales, Functional Consultant)
- Jedox – Specialist Online Certification (299)
- Introduction to R for Data Science (edX)



Senior Infor BI and Birst Consultant
Consultant: Yohan Dole

- Google Digital Garage – Fundamentals of Digital Marketing

Training

- Infor Business Intelligence (LBI & Infor BI)
- Infor ION & Birst Training (US & France)
- Infor BI Pre-Sales Training (US)
- Birst – Beginner Training

Professional Summary

Preetha is a highly skilled Infor Certified Birst Developer and Robotic Process Automation (RPA) Specialist with over 7 years of progressively responsible experience in the Business Intelligence (BI) domain. Her expertise spans the entire BI lifecycle, including report development, OLAP tools, KPI generation, and interactive dashboards. She has substantial experience working with Data Warehouses, Dimensional Modeling, and ETL (Extract, Transform, Load) processes, which she has successfully applied to multiple complex client projects.

Throughout her career, Preetha has been involved in all stages of the software development lifecycle, from understanding requirements and designing business solutions to developing, implementing, testing, and providing post-deployment support. As a developer and consultant, she provides optimal solutions that meet business needs and streamline operations. Her strategic approach has enabled her to help businesses achieve higher operational efficiency and improved data-driven decision-making.

Expanded Expertise and Roles

- **Business Intelligence Lifecycle:** Proficient in report development, OLAP tools, KPI generation, and creating interactive dashboards.
- **Data Warehousing:** Extensive experience with Data Warehouses, Dimensional Modeling, and ETL processes.
- **Software Development Lifecycle:** Involved in all stages from requirement analysis and business solution design to development, implementation, testing, and post-deployment support.
- **Robotic Process Automation (RPA):** Skilled in automating repetitive tasks to enhance efficiency and accuracy.

Key Strengths

- **Technical Proficiency:** Deep knowledge of Infor Birst and RPA technologies, enabling the delivery of high-quality BI solutions.
- **Strategic Approach:** Focused on providing solutions that streamline operations and enhance data-driven decision-making.
- **Client-Centric:** Committed to understanding and meeting the unique needs of each client, ensuring optimal outcomes.
- **Effective Communication:** Excels in conveying complex technical information to non-technical stakeholders, ensuring clarity and alignment.
- **Continuous Improvement:** Dedicated to ongoing professional development to stay abreast of the latest industry trends and technologies.

Relevant Skills

- **Infor Birst:** Advanced knowledge of Infor Birst for reporting, data integration, and analytics. Experienced with BQL (Birst Query Language) expressions for creating complex reports and dashboards.
- **Data Visualization:** Proficient in transforming complex datasets into meaningful visual representations, allowing business stakeholders to quickly interpret key insights and make informed decisions.

- **Data Reporting:** Skilled in building end-to-end reports from data extraction to publishing, using tools like Infor Birst and SQL.
- **Business Intelligence (BI):** Expertise in leveraging BI tools for data analysis, KPI creation, and developing interactive, real-time dashboards that drive business insights.
- **Infor FSM Reports & Infor GHR Reports:** Experienced in working with Infor FSM (Finance and Supply Chain Management) and Infor GHR (Global Human Resources) reports to meet business requirements.
- **SQL Developer:** Strong SQL skills for querying databases, building data models, and optimizing ETL processes.
- **Infor Data Lake:** Knowledge of Infor Data Lake for data storage, querying, and integration.
- **BQL Expressions:** Proficient in writing and implementing BQL expressions to create complex calculations and reports.
- **Robotic Process Automation (RPA):** Expertise in automating business processes using RPA tools like UiPath and Automation Anywhere to improve efficiency and reduce manual tasks.
- **Artificial Intelligence (AI) & Machine Learning:** Familiar with the integration of AI and ML technologies in automation processes to drive smarter, more adaptive solutions.
- **Visual Basic .NET (VB.NET):** Experience in using VB.NET for application development and automation.

Clients/Experiences

Cendien – Carrollton, TX
Senior Infor Birst Consultant

07/2022 - Present

Preetha currently serves as a Senior Infor Consultant at Cendien Consulting, where she plays a pivotal role in leading and executing complex Business Intelligence (BI) and reporting solutions for a diverse range of clients. She has successfully spearheaded high-profile projects, including Infor FSM (Financial and Supply Management) and Global HR implementations, showcasing her expertise and commitment to delivering exceptional results.

Responsibilities:

- Led projects as a Lead Analyst, overseeing both Space Administration and Report Development within Infor Birst.
- Handled end-to-end administrative functions, including space and account management, report catalogs, properties, and security filters.
- Managed and migrated reports and dashboards between different spaces, executing commands and ensuring seamless data flow.
- Specialized in extracting data from Infor FSM and GHR applications using connectors and shared connections.
- Expertly modeled data according to user needs, and developed ETL scripts for efficient data transformation.
- Developed complex BQL expressions for customized reports, including advanced functions like STAT and LOOKUP.
- Engaged in requirement gathering, proof-of-concept development, and mitigating migration risks through effective testing.
- Led the migration of BI contents to Birst, ensuring data integrity and reporting accuracy.



Senior Infor Birst Consultant
Consultant: Preetha Kumar

HCL Technologies
Lead Technical Engineer

2021 – 2022

At HCL Technologies, Preetha served as a **Lead Technical Engineer**, where she played a pivotal role in automating business processes for **Valley Strong Credit Union**. She was deeply involved in the development and design of Robotic Process Automation (RPA) solutions, significantly **enhancing operational efficiency** and accuracy. Her contributions were instrumental in streamlining workflows and optimizing business operations through innovative automation strategies.

Responsibilities:

- Designed solution flow in Solution Design Documents (SDD) for critical RPA projects such as **Incomplete Loan Application, Loan Assignment, and Solar Loans**.
- Automated document processing tasks using **UiPath** and advanced AI features like **Document Understanding (DU)**, including handwritten and unstructured PDFs.
- Implemented complex automation workflows using **Intelligent Keyword-based Extraction and Machine Learning Extractors**.
- Worked on creating and managing multi-queue architectures and persistent activities within orchestration processes.
- Developed troubleshooting and error-handling procedures to ensure automation accuracy and reliability.
- Gained deep experience in managing robots, machines, and licenses, optimizing their usage for various automation processes.

News Technology Services
Senior Infor Analyst

2019 – 2021

As a Senior Infor Analyst at News Technology Services, Preetha played a crucial role in a major **Infor EAM (Enterprise Asset Management)** project. She was instrumental in **integrating data and ensuring its accuracy**, which was vital for effective reporting and informed decision-making. Her contributions significantly enhanced the reliability and usability of the data, supporting the organization's strategic goals and operational efficiency.

Responsibilities:

- Led the end-to-end implementation of **Infor EAM** using **Infor Birst** for data extraction, transformation, and reporting.
- Utilized **ION** for seamless connectivity and data extraction from EAM applications, ensuring efficient data flow to Infor Birst.
- Queried data objects from **Data Lake Compass** using SQL, loading the data into **Birst** and implementing business logic via ETL scripting.
- Managed the transformation of data into dimensions and established joins between datasets to ensure accurate reporting.
- Developed and published complex reports, enabling key stakeholders to access real-time, actionable data.
- Successfully migrated legacy BI content to Birst, enhancing the platform's capabilities and performance.



Senior Infor Birst Consultant
Consultant: Preetha Kumar

Wipro Technologies
Junior Software Engineer

2017 – 2018

At Wipro Technologies, Preetha worked as a Junior Software Engineer, gaining foundational experience in data extraction, automation, and report generation using tools like **UiPath** and **Birst**.

Responsibilities:

- Extracted and updated data from databases using **SQL**, integrating this data into web applications for processing and reporting.
- Collaborated with the Center of Excellence (COE) team to develop reusable bots and streamline automation processes.
- Worked extensively with **UiPath** to design, test, and deploy bots for various business process automation tasks.
- Developed projects using **XML**, **HTML**, and **JavaScript** to enhance automation workflows.
- Produced and presented reports and dashboards using **Birst**, ensuring that clients had access to accurate, visual data insights.

Education

Bachelor of Engineering in Computer Science - Sri Ramakrishna Engineering College

Licenses & Certifications

- **Birst Infor Administrator Associate Certified – Infor**
- **Birst Infor Analyst Associate Certified – Infor**
- **Automation Anywhere Advanced Certified – Automation Anywhere**
- **UiPath Advanced Certification – UiPath**



Senior Infor Technical Consultant
Consultant: Muriel Penafuerte

Professional Summary

Muriel is a seasoned consultant with over 15 years of experience in Information Technology, specializing in the implementation, integration, and optimization of Infor applications and technology platforms. She possesses a deep technical understanding of various Infor products, including **Infor Global HR (GHR)**, **Infor Talent Management**, and **Infor CloudSuite™ Financials and Supply Management**. Muriel has extensive expertise with key Infor technologies such as Infor Configuration Console, Infor Operating System (OS), Infor Landmark Java Framework, and Infor Process Automation (IPA).

Her career has spanned a wide range of roles, from Landmark application development to security implementation, process automation, and analytics/reporting. She has been directly involved in the **customization, configuration, migration, and integration** of complex Landmark application projects for clients across diverse industries. Throughout her career, Muriel has **demonstrated a strong ability to analyze complex business requirements** and provide tailored solutions to optimize business operations.

Muriel is a trusted advisor for organizations seeking guidance on the implementation of Infor platforms, leveraging her deep knowledge to ensure that clients realize the full potential of their technology investments. She has a reputation for effectively translating business needs into technical solutions, making her an invaluable asset in the optimization of business processes, system configurations, and automation initiatives.

Expanded Expertise and Roles

- **Landmark Application Development:** Proficient in developing and customizing Landmark applications to meet specific client needs.
- **Security Implementation:** Skilled in implementing robust security measures to protect sensitive data and ensure compliance.
- **Process Automation:** Expert in automating business processes to enhance efficiency and reduce manual workload.
- **Analytics and Reporting:** Adept at creating comprehensive analytics and reporting solutions to provide actionable insights.

Key Strengths

- **Technical Proficiency:** Deep technical knowledge of Infor products and technologies, enabling effective implementation and optimization.
- **Business Acumen:** Strong ability to understand and analyze complex business requirements, providing tailored solutions that drive operational efficiency.
- **Client-Centric Approach:** Committed to ensuring client success by delivering high-quality, customized solutions that meet their unique needs.
- **Effective Communication:** Excellent at bridging the gap between technical and non-technical stakeholders, ensuring clear and effective communication throughout project lifecycles.
- **Leadership and Collaboration:** Proven ability to lead cross-functional teams and foster collaboration to achieve project goals.

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<http://www.cendien.com>

Relevant Skills

Certifications

- **Infor Certified Landmark Developer** – Demonstrates Muriel's proficiency in Landmark platform development, including custom applications, security configurations, and process automation.
- **Infor Process Automation Configuration and Administration Skills** – Validates her expertise in configuring and administering Infor Process Automation (IPA) to streamline business operations.

Infor Applications

- **Infor CloudSuite™ Financials and Supply Management** – Extensive experience with this cloud-based financial and supply chain management suite, optimizing financial processes and improving operational efficiency.
- **Infor GHR (Global HR)** – Specialized in implementing Infor Global HR solutions, enhancing HR processes, and supporting workforce management functions.
- **Infor Talent Management** – Expertise in configuring and managing talent acquisition, performance management, and workforce optimization tools within Infor's talent management suite.
- **Landmark Security** – Deep understanding of Landmark security architecture, including user roles, permissions, and access management for safeguarding enterprise data.
- **Landmark Java Framework / LPL** – Proficient in using the Landmark Java Framework and Landmark Programming Language (LPL) to develop custom applications that meet specific client needs.
- **Infor Process Automation (IPA)** – Skilled in configuring and automating complex business processes using Infor Process Automation, enhancing operational efficiency and reducing manual workloads.
- **Infor ION** – Expertise in configuring and integrating Infor ION middleware for seamless data exchange across various enterprise systems.
- **Infor HTML5 / JavaScript** – Knowledgeable in using modern web technologies to build responsive applications and interfaces.
- **Business Intelligence Suite** – Adept in leveraging Infor's BI tools for generating actionable insights, creating reports, and visualizing key business metrics.

Other Non-Infor Applications

- **Microsoft Power Query** – Proficient in using Power Query for data extraction, transformation, and loading (ETL) tasks to support business intelligence initiatives.
- **MS SQL** – Extensive experience with Microsoft SQL Server for database querying, data manipulation, and reporting.
- **Visual Basic, VBA / .NET** – Strong background in VB.NET, VBA, and .NET programming for application development and process automation.
- **Crystal Reports** – Experienced in using Crystal Reports for designing and generating comprehensive business reports.

Programming Languages

- **Java / JavaScript** – Proficient in both Java and JavaScript, developing dynamic and scalable applications.
- **JSON** – Experienced in working with JSON data formats for API integrations and data processing.
- **XML** – Expertise in using XML for data interchange, configurations, and system integrations.



Senior Infor Technical Consultant
Consultant: Muriel Penafuerte

- **HTML** – Skilled in HTML for developing user interfaces and web applications.
- **Zebra Programming** – Familiar with Zebra programming for custom printing solutions.
- **MS SQL** – Advanced knowledge of SQL for querying databases, data modeling, and report generation.
- **Visual Basic, VBA / .NET** – Skilled in using VB.NET and VBA for process automation and developing customized business solutions.

Clients/Experiences

Cendien – Carrollton, TX

2022 - Present

Senior Infor Tech Consultant

Muriel has worked across a variety of industries, bringing her vast technical expertise and problem-solving abilities to organizations in Healthcare, Public Sector, Conglomerates, Financial Services & Insurance, Retail, and Hospitality. Her experience spans multiple facets of business technology, including application configuration, security management, process automation, integration, and data analytics.

Responsibilities:

- **Application Configuration** – Expertise in tailoring Infor applications to meet specific business requirements, ensuring seamless operations and improved system performance.
- **Security Configuration** – Proficient in configuring system security, user roles, and access controls to protect sensitive data and ensure regulatory compliance.
- **Process Automation** – Skilled in streamlining business processes through automation, reducing manual interventions, and enhancing overall operational efficiency.
- **Integration** – Experienced in integrating Infor applications with third-party systems to ensure seamless data flow and improve interdepartmental collaboration.
- **Upgrade and Migration** – Expertise in managing upgrades and migrations, ensuring that legacy systems transition smoothly to newer Infor platforms without disruption.
- **System Support** – Adept at providing ongoing support, troubleshooting, and optimization to ensure that systems remain stable and continue to meet business needs.

Key Duties Encompass:

- Implementing Infor applications and technology platforms to streamline business processes and improve operational efficiency.
- Providing expert guidance in understanding the business processes of Infor applications and helping clients optimize their use of these systems.
- Analyzing existing workflows, recommending modifications, and making enhancements to improve productivity and achieve better results.
- Developing technical solutions for complex business problems, ensuring that they align with both business requirements and technical constraints.
- Administering and troubleshooting Landmark security and application configurations, ensuring that systems run securely and efficiently.

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Senior Infor Technical Consultant
Consultant: Muriel Penafuerte

- Guiding junior consultants through the implementation process, ensuring that best practices are followed and solutions are delivered on time.
- Reviewing the work of other consultants, identifying potential issues, and providing constructive feedback before proceeding to testing.

Infor PSSC

Senior Infor Consultant

Muriel served as a Senior Infor Consultant at Infor PSSC for nearly a decade, specializing in the implementation and support of Infor applications, including Infor CloudSuite Financials, Infor GHR, and Infor Talent Management. Her role involved complex customization, configuration, and process automation for clients across various sectors, including healthcare, finance, and public sector.

Responsibilities:

- Led multiple successful implementations of Infor CloudSuite Financials and Infor GHR, ensuring that each deployment met client-specific needs.
- Designed and executed comprehensive security configurations to protect sensitive data and optimize user access across applications.
- Played a pivotal role in the migration of legacy systems to Infor CloudSuite platforms, ensuring data integrity and system reliability throughout the process.
- Automated critical business processes using Infor Process Automation (IPA), reducing manual workloads and improving operational efficiency.
- Provided expert technical guidance to clients and internal teams, ensuring successful adoption of Infor technologies.

Infor PSSC

Resource Planner

Muriel's role as a Resource Planner involved managing the booking and scheduling of services for Infor consultants across the APAC and ANZ regions. She played a key role in optimizing resource allocation and supporting the business development efforts of Infor's consulting division.

Responsibilities:

- Managed and forecasted the workloads of over 90+ consultants across the APAC and ANZ regions, ensuring efficient resource allocation.
- Helped implement a Resource Management process within Lawson Manila, which enhanced operational efficiency and resource tracking.
- Coordinated business opportunities and subcontractor relationships, ensuring that engagements were delivered with the right talent and at appropriate margins.

Accenture Delivery Center

Software Engineer

As a Software Engineer at Accenture, Muriel focused on developing, testing, and providing support for the SEPG TRDG tools, acting as the primary interface between end-users and the supported tools.



Senior Infor Technical Consultant
Consultant: Muriel Penafuerte

Responsibilities:

- Played a critical role in the development and maintenance of SEPG TRDG tools, ensuring their alignment with business needs.
- Delivered comprehensive training and support for end-users, ensuring smooth adoption of new tools and processes.

HSBC

Data Electronic Processing, Business Intelligence – Operations Analyst

Muriel was responsible for implementing and managing business intelligence tools and reporting systems at HSBC, focusing on improving operational efficiency through data analysis and performance evaluations.

Responsibilities:

- Spearheaded the implementation of a new reporting tool that improved the organization's ability to track performance and service levels.
- Coordinated with workforce management to optimize staffing levels and ensure the center's operational efficiency.

City Government of Muntinlupa

MIS Department – System Analyst

Muriel worked as a System Analyst within the MIS Department of the City Government of Muntinlupa, where she was responsible for developing IT infrastructure and automating government processes.

Responsibilities:

- Developed and implemented multiple automated systems, including the Personnel Information System,
**Entrepreneur Financing

Education

St Paul College of Manila - 1999 – 2003

Bachelor of Science in Computer Science

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Senior Infor Technical Consultant
Consultant: Adarsh Pal

Professional Summary

Adarsh is a highly skilled and self-motivated IT professional with over 4.5 years of experience specializing in **Infor LN**, an advanced ERP solution. He possesses a deep technical competency in developing and maintaining interfaces, including end-to-end processes from requirements gathering, system analysis, coding, testing, deployment, and post-deployment enhancements.

Throughout his career, Adarsh has worked on diverse projects that span across **Implementation, Integration, Migration, New Developments, Enhancements, and Support activities** for Infor LN and other integrated systems. He is particularly adept at working with **Infor ION** and integrating **Infor LN** with both on-premises and cloud-based applications.

A collaborative team player, Adarsh continuously seeks to broaden his technical expertise and master new domains and technologies to contribute to organizational goals. His solid understanding of ERP solutions, paired with his ability to navigate complex technical challenges, makes him an asset in delivering high-quality IT solutions that align with business needs.

Relevant Skills

Programming Languages: Adarsh is proficient in a wide range of programming languages, including **3GL, 4GL, AFS, UE, DAL, DAL2, C/C++, SQL, HTML, XML, XSLT, JSON, and JAVA**. These skills enable him to develop, customize, and optimize applications and interfaces across various platforms.

Infor Products:

- **BaaN4, BaaN5** – Extensive experience with BaaN legacy systems.
- **Infor ERP LN (FP7, 10.3, 10.4, 10.5, 10.6, 10.7)** – Expertise in the latest versions of Infor LN, focusing on integration, customization, and optimization.

Database Management: Adarsh has strong experience working with both **Microsoft SQL Server** and **Oracle**, including database design, querying, and performance tuning for ERP systems.

Operating Systems: Skilled in working with both **Windows** and **Unix/Linux** environments, Adarsh is versatile in managing applications and configurations across different platforms.

Clients/Experiences

Adarsh brings a **wealth of experience across multiple industries**, where he has played pivotal roles in the integration, configuration, and enhancement of Infor LN and other business-critical applications. His extensive hands-on expertise in both the technical and functional aspects of ERP systems has empowered him to deliver successful projects. Adarsh excels particularly in areas such as **system integration, workflow automation, and cloud-based solutions**, ensuring seamless and efficient operations.

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Senior Infor Technical Consultant
Consultant: Adarsh Pal

Key Projects and Responsibilities:

- **Infor LN 10.6 Integration with SimpleLegal:** Adarsh worked on the integration of Infor LN 10.6 with SimpleLegal, a cloud-based finance application. This involved setting up API connections using ION integration points to call HTTP methods such as GET, POST, and PATCH. The integration also required handling multiple Document Flows, Custom BODs, and creating Monitors and Alerts to ensure seamless communication between the two systems.
- **Purchase Order and Requisition Workflows:** Adarsh configured Purchase Order Approval and Requisition Workflows in ION Desk, leveraging the OCM (Order Change Management) for TDPO (Purchase Orders) and TDREQ (Purchase Requisitions) in Infor LN. His work ensured that whenever a PO was approved or a Requisition was submitted in Infor LN, the workflow would automatically trigger, assigning tasks to the appropriate roles based on predefined checks such as budget and approval limits.
- **BOD/BDE Development & Web Services:** Adarsh has been involved in developing BOD (Business Object Documents) and BDE (Business Data Exchange) solutions, which are essential for ensuring seamless data exchange between Infor LN and other systems. His work includes developing and maintaining Web Services for API-based integration, ensuring reliable communication and data synchronization between disparate systems.
- **IDM Workflow Integration:** Adarsh integrated Infor LN with Identity Management (IDM) systems to trigger workflows directly from the IDM platform via ION. This integration allowed for more efficient user access management and automated business processes linked to employee lifecycle management.
- **Workday Integration with Infor LN:** He worked on the integration of Infor LN 10.5 with Workday, a cloud-based HR and time management application. This integration involved the exchange of XML files via SFTP, coupled with ION document flows, connection points, monitors, and alerts to ensure data consistency and workflow automation between HR and finance systems.
- **Development of Extensions in Infor LN Studio:** Adarsh was responsible for developing custom Infor LN components through Infor LN Studio, an Eclipse-based framework. This included the creation of tables, sessions, reports, BOD and BDE extensions, and new Infor LN components tailored to specific business requirements.
- **Report Personalizations & Infor Reporting (IBM Cognos):** He customized and personalized various Infor LN reports, sessions, forms, and menus to enhance user experience and meet client-specific reporting needs. Additionally, Adarsh has experience designing and developing reports using Infor Reporting tools, particularly IBM Cognos Report Studio.
- **Integration with Other Infor Tools:** As part of his work, Adarsh successfully integrated Infor LN with other Infor tools like ION, creating BBODs (Business By Order Documents), Document Flows, Workflows, Monitors, and Alerts to support seamless communication between various enterprise systems.

Cendien – Carrollton, TX
Senior Infor Technical Consultant

03/2023 - Present

Adarsh's experience spans across multiple industries and regions, working with both local and global clients in various sectors. His roles have ranged from project-based development to ongoing support and enhancements of Infor LN solutions.

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Senior Infor Technical Consultant
Consultant: Adarsh Pal

Responsibilities:

- Providing expert guidance and hands-on support for Infor LN-based integrations and enhancements. His work includes client-specific customizations and optimizations.
- Contributed to various integration and enhancement projects for Infor LN clients, including cloud integrations and automation workflows.

ISGEC Heavy Engineering Limited

- During his time with this India-based manufacturing company, Adarsh was involved in the integration of Infor LN with other enterprise systems, improving operational efficiencies through custom workflows and automated processes.

Tata Consultancy Services

- Adarsh worked with Tata Consultancy Services (TCS) in Pune, India, contributing to the development, customization, and support of Infor LN applications for large enterprise clients. His role included performing system upgrades, migrations, and integrations to ensure seamless functionality.

Education

Bachelor of Engineering (B.E.) – Mechanical Engineering

Shri Vaishnav Institute of Technology and Science (SVITS) – 2016

Adarsh graduated with a degree in Mechanical Engineering, laying the foundation for his problem-solving and analytical skills, which he later applied to IT and ERP systems.

All India Senior Secondary Certificate Examination (12th) – Mathematics

Central Board of Secondary Education (CBSE) – 2012

All India Senior Secondary Examination (10th)

Central Board of Secondary Education (CBSE) – 2010

Professional Summary

Vishal is a highly proficient and dynamic **Senior .NET Developer** with over 6 years of extensive experience in developing **web applications, APIs, and utility projects** using technologies such as **ASP.NET MVC** and **ASP.NET Core**. He has a strong command over **object-oriented design** principles, **complexity analysis**, problem-solving techniques, and effective debugging practices. Known for his deep understanding of **information systems**, Vishal excels in evaluating end-user requirements and custom designing solutions that enhance system efficiency and functionality.

Vishal's expertise includes designing and implementing secure, maintainable, and scalable code in **.NET** technologies while ensuring data privacy and security. He has extensive experience in **UI designing, SQL Server** database management, and crafting **Web APIs** using industry best practices. His ability to write efficient, reusable code and his familiarity with multiple **browsers and web applications** make him a highly valuable asset in delivering quality solutions across various platforms. Vishal thrives in collaborative environments, working effectively with business managers and cross-functional teams to meet project requirements and deadlines.

Relevant Skills

Vishal possesses a comprehensive technical skill set across various programming languages, frameworks, and tools, enabling him to effectively contribute to both front-end and back-end development:

Languages & Frameworks:

- .NET 3.5/4.0/4.5, MVC 4.0/5.0
- Blazor, ASP.NET Core, Web API, ASP.NET SignalR, Entity Framework
- JavaScript, jQuery, Bootstrap, HTML5, LINQ, AJAX

Database & Tools:

- SQL Server (All Versions), Team Foundation Server (TFS), GIT
- Visual Studio, VS Code, Android Studio
- Postman, Firebug, Fiddler

Web Technologies:

- XML, JSON, RESTful APIs

Clients/Experiences

Cendien – Carrollton, TX
Senior Developer

12/2020 - Present

Vishal has worked with various clients across different domains, developing and delivering web applications and backend solutions. His experience spans full-stack development, with a focus on creating responsive, secure, and



.Net Developer
Consultant: Vishal Modi

high-performance systems. His key expertise areas include UI development, API integrations, and enterprise-level application maintenance.

Key Projects & Responsibilities:

Upflyte

Senior .NET Developer

Technologies: Blazor, ASP.NET Core API

Vishal is currently working as a senior developer on Upflyte, an aviation-focused platform tailored by pilots, exclusively for pilots. He plays a key role in the development and enhancement of tools for flight planning, scheduling, document organization, and integrated logbooks. His responsibilities include designing and implementing core functionality using Blazor and ASP.NET Core API, ensuring a seamless user experience.

Diamond ERP

Senior .NET Developer

Technologies: ASP.NET MVC 5, Web API

Vishal contributed to the development of Diamond ERP, a system that manages the complete functional transaction flow for processing raw diamonds into finished products. He was responsible for integrating key modules, developing Web API services, and ensuring data consistency throughout the system.

Machine Learning Project

Senior .NET Developer

Technologies: ASP.NET MVC 5, Web API

Vishal worked on a challenging Machine Learning project aimed at extracting billing information from PDFs using complex algorithms. The project involved designing a system that could handle diverse formats from over 600,000 vendors. His work included developing APIs and backend services to parse and standardize vendor-specific formats.

Premier Senior Solutions

Lead Web Developer

Technologies: ASP.NET MVC 5, Web API, ASP.NET SignalR

Vishal led the development of an online listing service for senior care. The platform allows users to find specialized care for senior citizens. He was responsible for creating a robust backend infrastructure, implementing real-time data updates using ASP.NET SignalR, and ensuring smooth API integration.

Tracking Master System (Desktop App & Web App)

Backend API Developer

Vishal developed the backend APIs for the Tracking Master System, a tool that tracks user activity on desktops. He

built the system to monitor idle time, lock inactive systems, and take regular snapshots for tracking purposes. The web version allows users to manage these systems and purchase memberships. Vishal developed and maintained APIs to support these functionalities.

Survey Management System Junior Web Developer

Vishal worked on the Survey Management System, an educational platform that manages surveys across multiple schools. His role involved designing and implementing features to create survey forms, questions, and manage participant data. The application was built using ASP.NET MVC 4.0 N TIER.

Learning Management System (LMS) Junior Web Developer

Vishal contributed to the development of an LMS that facilitates lesson planning for teachers. He developed features that allowed users to add diverse content such as audio, video, and books to lesson plans, improving the educational experience. The system was developed in ASP.NET MVC 4.0 N TIER.

Education

Vishal has a strong educational foundation in computer applications, which has contributed to his problem-solving abilities and technical expertise:

- **Master of Computer Applications (MCA)** – Uka Tarsadia University, Bardoli, Gujarat
Graduated in 2017 with a CGPA of 9.00
- **Bachelor of Computer Applications (BCA)** – Veer Narmad South Gujarat University, Surat, Gujarat
Graduated in May 2015 with a CGPA of 8.04
- **Higher Secondary Certificate (H.S.C.)** – Shishu Vihar Vidhyalaya
Graduated in May 2012 with a percentage of 66.27%
- **Secondary School Certificate (S.S.C.)** – Shishu Vihar Vidhyalaya
Graduated in May 2010 with a percentage of 69.38%



Senior Project Manager and Application Consultant
Consultant: Moyi Banerjee

Professional Summary

Moyi is a highly accomplished **Senior Project Manager and Application Consultant**, driven by a passion for customer success and delivering high-quality project outcomes. With a **proven track record** of managing and executing projects efficiently, she consistently demonstrates exceptional skills in triaging projects, managing risks, and ensuring timely completion. Moyi's **attention to detail and disciplined approach** to project execution enable her to drive complex initiatives to successful completion while maintaining a keen focus on customer satisfaction.

Her expertise encompasses managing client deliverables, system availability, performance, and security, leveraging **proactive monitoring** and robust risk mitigation strategies. Known for her **exceptional communication skills**, Moyi excels at bridging the gap between technical and non-technical stakeholders, ensuring alignment and informed decision-making throughout the project lifecycle. Her ability to manage cross-functional teams, streamline workflows, and foster collaboration has been a key factor in the successful delivery of multiple high-impact projects.

With a strong foundation in **project management and application consulting**, Moyi adeptly handles a wide range of responsibilities—from planning and budgeting to team coordination and stakeholder communication—ensuring that projects are delivered on time, within budget, and to the highest quality standards.

Relevant Skills

Moyi's skill set encompasses a comprehensive array of project management and application consulting capabilities essential for the seamless execution of complex projects:

Project Management & Execution

- Project Planning and Budgeting
- Assessing Risks and Opportunities
- Project Scheduling, Management & Control
- Resource Allocation & Coordination
- Risk Mitigation and Issue Resolution

Tools & Software

- Microsoft Office Suite (Word, Excel, PowerPoint)
- SharePoint for Document Collaboration
- Project Management Software (Monday.com)
- ServiceNow, Fresh Desk, Amelia for IT Service Management
- ERP Systems, including Infor Solutions

Communication & Documentation

- Effective Communication with Clients & Stakeholders
- Documentation and Reporting
- Preparation of Status Reports and Deliverables
- Change Management & Process Mapping

Leadership & Coordination

- Cross-Functional Team Leadership
- Facilitating Meetings & Stakeholder Discussions
- Customer Relationship Management
- Training, Development, and Resource Management



Senior Project Manager and Application Consultant

Consultant: Moyi Banerjee

Key Strengths

- **Customer-Centric:** Dedicated to ensuring client success by delivering high-quality projects and maintaining strong relationships.
- **Project Oversight:** Proven track record in managing ERP projects, ensuring system integrations, and optimizing business processes.
- **Effective Communication:** Excels in communicating technical and non-technical information clearly, ensuring alignment among all project stakeholders.
- **Problem Solving & Risk Mitigation:** Skilled at identifying risks early, devising mitigation strategies, and addressing project challenges head-on.
- **Leadership:** Ability to lead diverse teams and manage resources effectively, resulting in the successful execution of complex projects.

Clients/Experiences

Cendien – Carrollton, TX

12/2020 - Present

Senior Project Manager / Application Consultant

Responsibilities:

Moyi has contributed to the success of several clients across a range of industries, managing ERP improvements, integrations, and process automation initiatives. Below are some of her key projects and responsibilities:

Moyi has led multiple projects for Cendien Consulting, coordinating various aspects of ERP improvements, integrations, and process automation across several clients. Her experience includes managing **Regional Transportation Authority (RTA)** ERP improvement projects, where she oversaw **Performance Appraisal (GHR)** improvements, **Infor Document Management** migrations, and the development of complex **BI FSM Reports**.

Selected Projects:

Regional Transportation Authority:

- Performance Appraisal (GHR) Integration
- Infor Document Management Migration from MHC to IDM
- Bank Integration and Open Enrollment
- BI FSM Report Development (Trial Balance, Audit, Combined Financial Reports)
- Infor Process Automation for Workflows and Requisitions

Santa Clara Valley Water:

- BIRST Report Development for Finance and Procurement
- Infor Process Automation for HR Reports, Requisition Approval Flow, AP Reports, and ACH Automation
- Third-Party Integrations with **Vemo** and **Standard Interface Development**

City of Concord:

- BSI TaxFactory v11 Upgrades and Police Department Salary Schedules
- Year-End Close & HR/Payroll Training

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- Crystal Report Development (AP Check Detail, Yearly Employee Hours Report, Administrative Reports)

MV Transportation:

- Infor Process Automation for PO Requisitions, PO Creation
- Integration with ICMIS and API-based changes to the MVP Tool

Responsibilities:

- Monitoring and reporting project milestones, deadlines, and progress to client IT executives.
- Managing project issues and tracking them through team meetings and resolution.
- Coordinating project planning and securing approval before project commencement.
- Consulting with stakeholders to develop and refine project plans.
- Overseeing cross-functional team collaboration to ensure alignment with project requirements, deadlines, and schedules.
- Preparing and submitting project deliverables while ensuring quality standards are met.
- Establishing and executing communication plans to keep all stakeholders informed.
- Managing change requests, ensuring all stakeholders are aware of schedule and budget impacts.
- Facilitating the development of user manuals, training materials, and documentation for successful project turnover.

Education

Moyi's academic background and additional certifications have significantly bolstered her ability to manage complex projects effectively while ensuring continuous professional development:

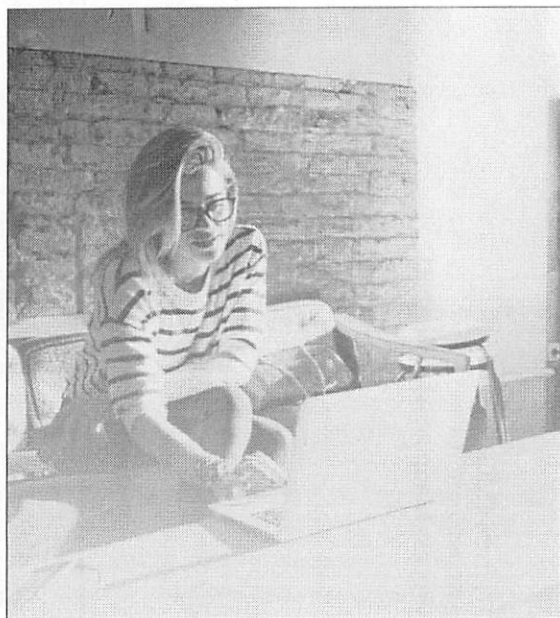
Advance Education

- Post Graduate Diploma in Business Management (PGDBM)
Narsee Monjee Institute of Management Studies (NMIMS), India
- Graduation in Commerce
Delhi University, India (1999)
- Intermediate (High School)
Central Board of Secondary Education (CBSE), India (1996)

Certifications and Training:

- Certificate in Information Technology (CIT) from CMC.
- ITIL Foundation Certification in IT Service Management.
- Trained in Soft Skills, Call Handling, and Process Mapping from Genpact.

Partnership



Cendien Infor CloudSuite Managed Services



CITY OF FORT LAUDERDALE

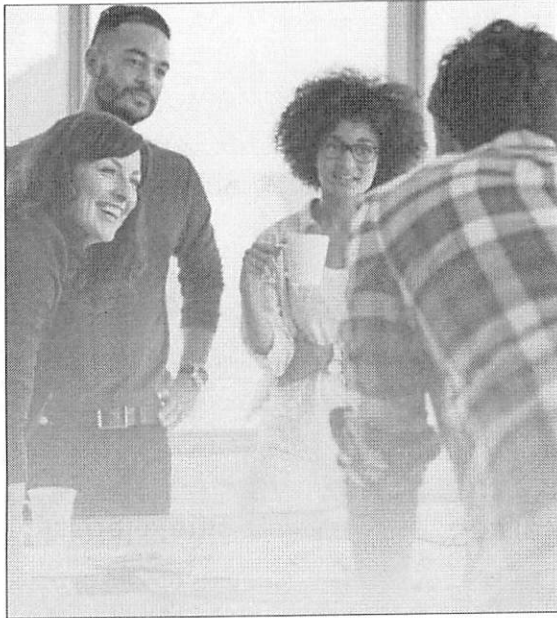
Cendien is a leading provider of managed services, offering a comprehensive suite of solutions for organizations of midsize.



Managed Services



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Agenda

- 1 Cendien Introductions
- 2 Services and Offering
- 3 Unique Model & Differentiators
- 4 Background & Scope
- 5 Interview Questions



Cendien Team



Israel Denis
Managing Director



Shirley Duong
Service Director & Success Manager



Javier Silva
Senior Technical Manager



Aishwarya Pappu
Project Coordinator



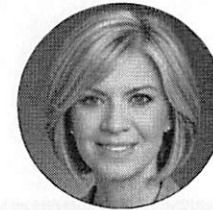
Moyi Banerjee
Project Manager



Lenny Zemman
Senior Technical Manager



Elizabeth Smith
Senior Functional Consultant



Joanne DeLorenzo
Senior Functional Consultant

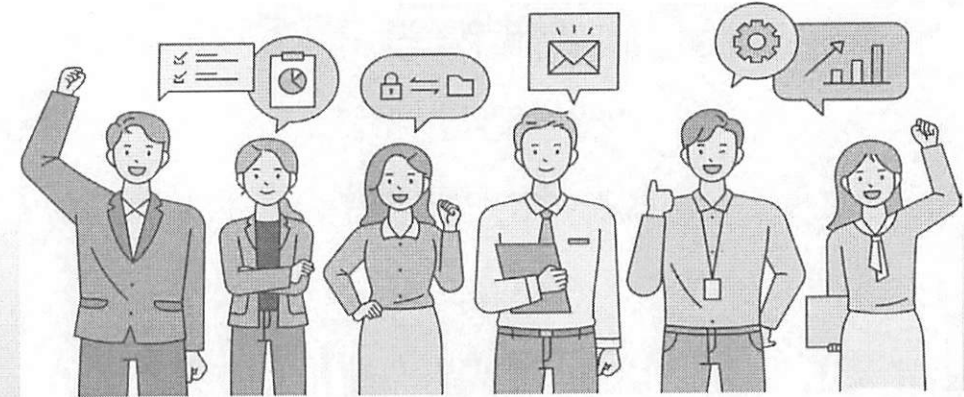


Managed Services





City of Fort Lauderdale Intro



Managed Services



Cendien Services



40+
consultants



26 Years

Application Support

System Administration

Development

Monitoring

Managed Services

Upgrades / Migrations

Staff Augmentation

Project Base

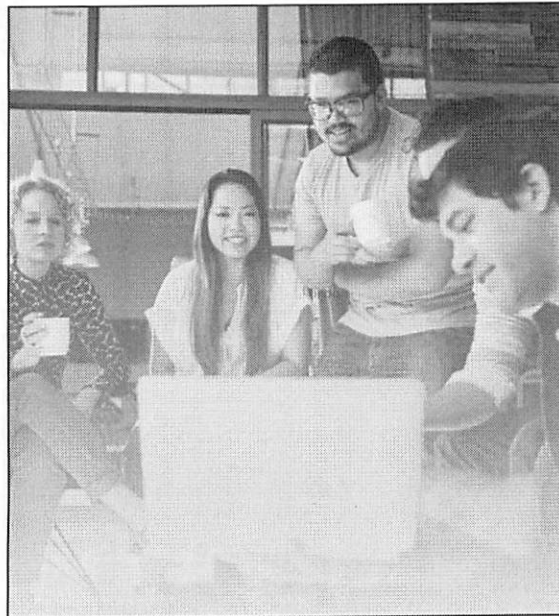
Training

Consulting Services



Managed Services



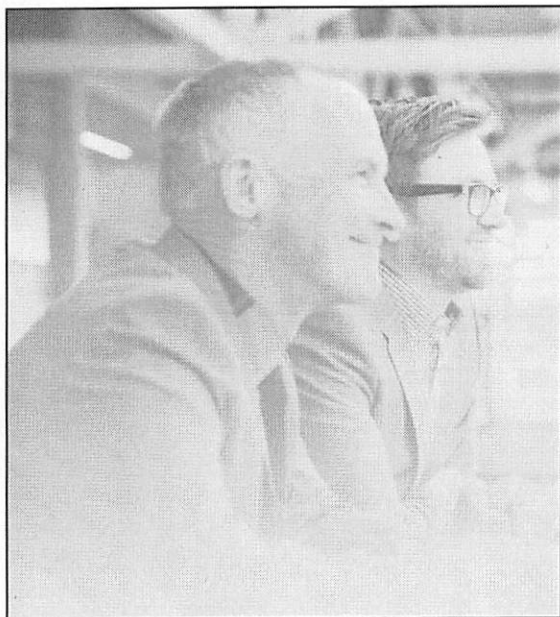


Comprehensive Support Model



Managed Services





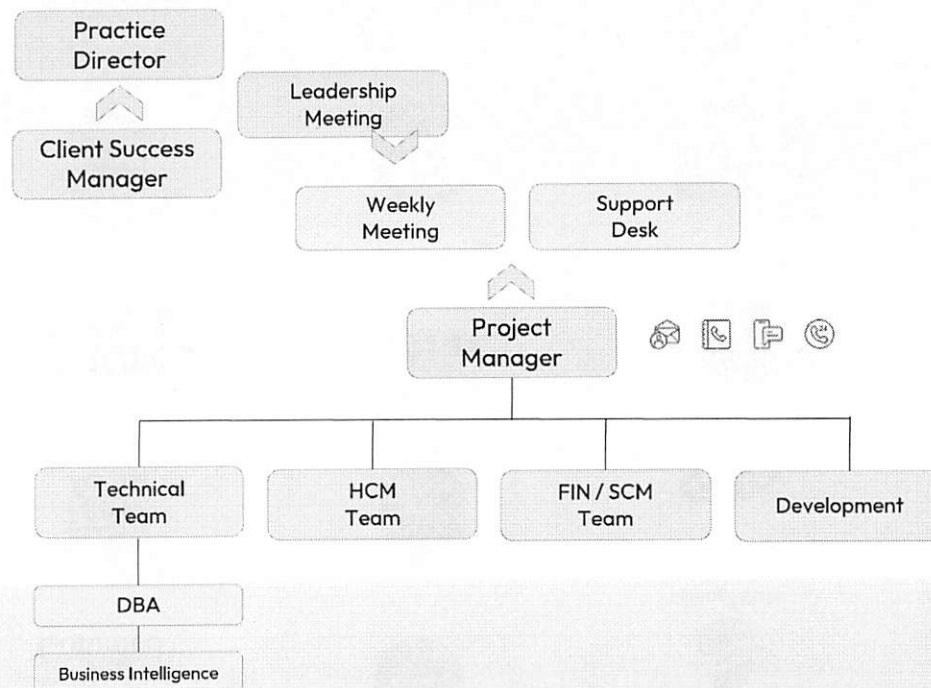
Comprehensive Support Model

Cendien Unique Support Model:

- Dedicated Client Success Manager
- Dedicated Project Manager
- Direct Access to Entire Team
- Consumption Tracking / Reporting
- Weekly Team Meetings w Project Manager
- Monthly / Quarterly Leadership Meetings
- Project Work



Support Structure



Trusted

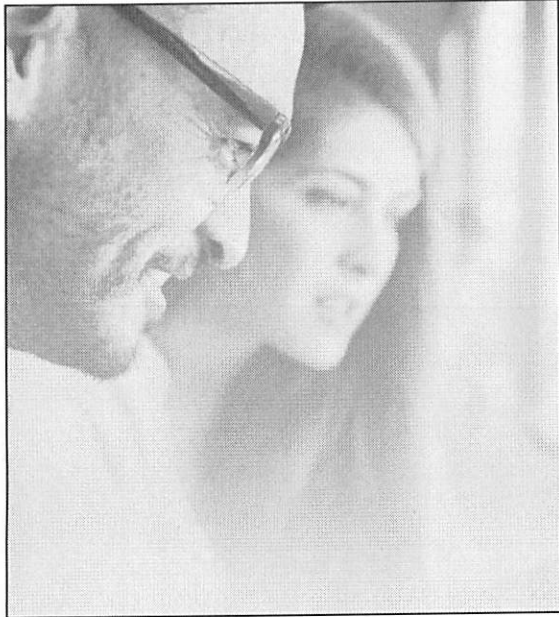


Client Trusted



Managed Services





Client Testimonials



Speedy Response Time



Delivering Results



Expertise of Consultants

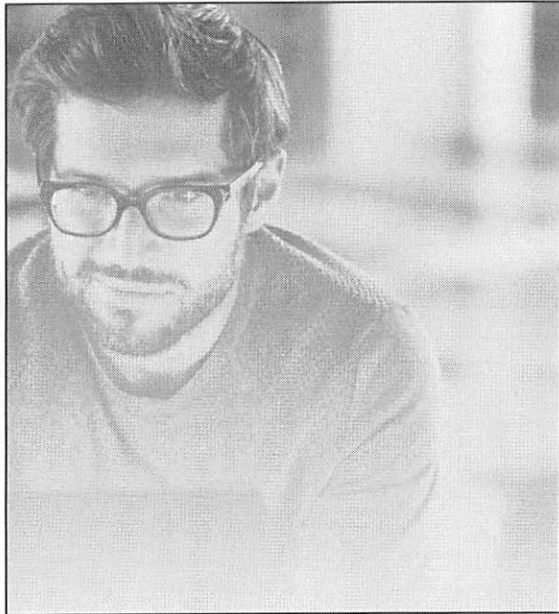


Infor Partnership



Managed Services





City Background

Infor CloudSuite Multi-Tenant

- Implemented by Infor on Dec 26, 2023
- Financials (FSM)
- Supply Chain (SCM)
- Human Capital (HCM)



Managed Services



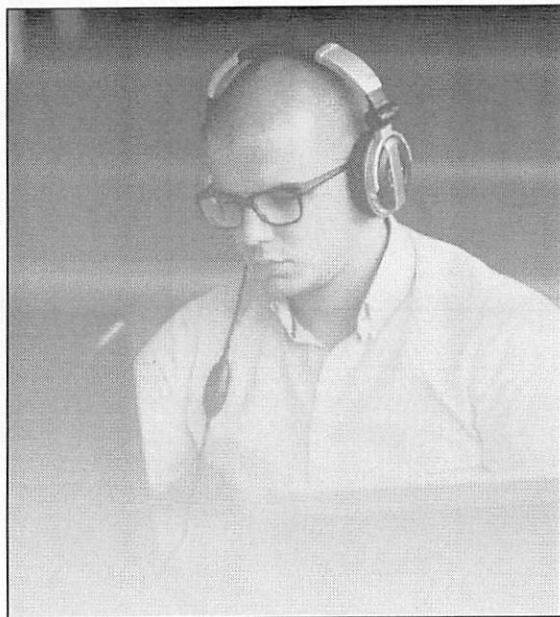


Scope of Work

Ongoing Support

- Application Support (Troubleshooting, Maintenance, Optimization)
- Integration & Reporting (Birst, Analytics, Dashboard)
- Technical Support (Security, Workflows, Development)
- Special Projects (Post Go-Live Audits)





Scope of Work

Work Conditions

- 1300 Hours per Year (25 hours weekly)
- Remote Work (8 am – 5 pm est)
- Quarterly Reviews (Stakeholders)

Cendien: Your Questions Answered



#1 What are some of the common issues clients face and how do you resolve them?

- Every Client is Unique
- Changes in Personnel
- Lack of Training / Knowledge
- Custom Personalized Training
- Birst / Analytic Reports
- Assistance w Month, Year, Period Closes
- Assistance w Open Enrollment
- Assistance w Monthly Updates



Cendien: Your Questions Answered



#2 Provide examples of complex issues you had with other municipalities starting with their initial problem to the final solution?

- Timesheet Issues – VW
- ERP Improvement Project – RTA
- Procurement Workflow Bottlenecks (Automations)
- COLA updates for COC
- Updates to Servers / Certificates



Cendien: Your Questions Answered



#3 What is the process you follow to support monthly and semi-annual patch review, new application features, and functionality?

- Review Release Notes (Risk Assessment)
- Backup of Personalizations / Customizations
- Runbook / Playbook after Updates Applied
- Testing and Monitoring



Cendien: Your Questions Answered



#4 How do you ensure continuity and quality of service during staff transitions or absences?

- Skills Matrix / Geographic Reach
- Shadowing Programs / Mentorship
- Playbooks / Backup SME
- Demand Forecasting
- Capacity Planning (20%-40% buffers)
- Seasonal Planning



Cendien: Your Questions Answered



#5 How do you prioritize and resolve daily issues or requests within the 25-hour weekly allocation?

- Urgency and Impact
- Clear Priorities / Expectations
- Time Management / Tracking
- Regular Review of Issues, Tickets, Requests
- Client Communication
- Track SLA



Cendien: Your Questions Answered

#6 How do you assess, scope, and quote for professional services related to special projects?

- Assessment of Request
- Scope the Project Out
- Estimate and Proposal
- Review and Obtain Approval

| Project Leadership & Project Management | | 16 hours |
|--|--|-----------|
| <ul style="list-style-type: none"> Work performed by Israel Denis & Linda VanTran Gebbia Project Discovery and Scope review Includes overall project leadership and management of the project Includes project management of Cendien and client resources, development, and execution of the implementation Plan from Testing to Go Live of the deliverables, follow-up on issues and change requests, controlling scope and system integration assurance Status meetings and assistance with documentation and project communication | | |
| Requirements Analysis Review and Design | | 10 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti, Sharon Jordan, Lovell Luis, and Linda VanTran Gebbia Includes project discovery with end-users and write-up of the technical specification and proposal | | |
| Interface Development and System Setup | | 48 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti Includes all interface program development, testing, and deployment using Lawson 4GL Includes systems setup of program, tables, and data | | |
| UAT Testing/QA | | 24 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti, Lovell Luis, and Linda VanTran Gebbia Includes work with end-users from HR/Payroll/Finance/IT to conduct testing and sign-off in the Test Environment Data Input/Extract, Data Validation, Testing, and Training of new process in the Test Environment | | |
| Production Support | | 16 hours |
| <ul style="list-style-type: none"> Work performed by Nicole Sutti, Lovell Luis, and Linda VanTran Gebbia Includes testing and sign-off with end-users from HR/Payroll/Finance/IT Data Input/Extract, Data Validation in the Production Environment Preparation of the Go Live Plan to implement the new process in Production | | |
| Total Estimate | | 114 hours |

Timeline

This project will take about 2 months (from the date given access) with an implementation date for Go Live in Production prior to 5/30/2022 and includes Postproduction Support.

| Milestones | Start Date | Due Date | Status | Resource |
|---|-----------------------------|--|--|---|
| Requirements Analysis, Review, and Design – Proposed & Approved | 4/6/2022 | 4/22/2022 | Approved by Marie/Maureen; e4 approved SOW 5/4 | Nicole, Sharon, Linda, Shirley |
| Systems Setup & Development & Testing - Crystal | 5/9/2022 | 5/18/2022 | Done * Nicole was OOO until 5/9 | Nicole, Sharon |
| UAT Testing & QA - Validation/Testing/ Sign-off | 5/19/2022 | 5/27/2022 | In Progress | Nicole, Sharon, Client HR Team: Kim, Elaine, Yvonne & IT Marie/Gene |
| Production Go Live & Support | Go Live by 5/30/2022 TBD | Postproduction Support until 6/15/2022 | Not Started | Nicole, Sharon, Linda, Shirley |

Please Note: System Setup, UAT Testing, and Go Live implementation will require Client staff assistance (8-16 hours). If staff are unavailable, this will impact the timeline.

Cendien: Your Questions Answered



#7 What is your process for transitioning from daily support to special project engagements?

- Special Projects > 40 hours goes to Project
- Weekly Review / Tracking
- Client Approval

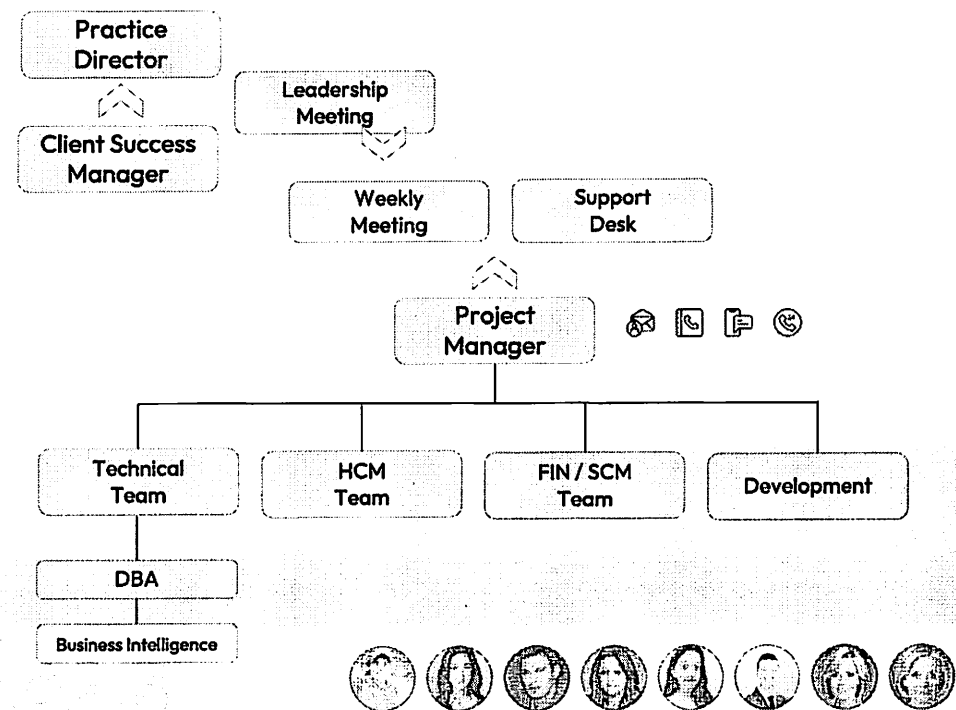


Cendien: Your Questions Answered



#8 What is your escalation process for unresolved issues or unexpected project challenges?

- Escalation to Project Manager
- Escalation to Success Manager
- Escalation to Practice Director



Cendien: Your Questions Answered



#9 Can your firm support training as part of the 25-hours when there is available time?

- Yes
- One Time or Ongoing
- Remote / Onsite there would be travel expenses



Cendien: Your Questions Answered



#10 Are there any additional fees we should be aware of for urgent or after-hours support?

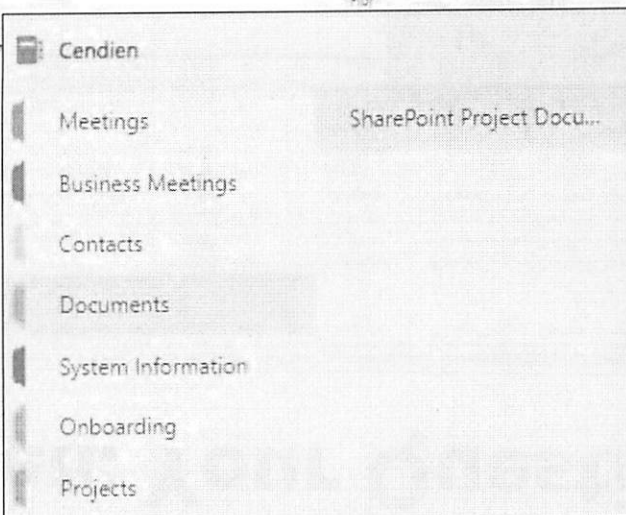
- No
- We are very transparent
- Planned / Schedule Off-Hour Support
- System Emergencies
- Unplanned Outages (Prod Down)
- Updates / Upgrades / Migrations / Conversions





Cendien: Your Questions Answered

| Onboarding Checklist for: | |
|---|---------------------------------|
| Introduction | |
| Preliminary Team Introductions | Linda / Israel / Client Contact |
| Basic Information | |
| Collect Basic Client Contact Information | Pior |
| Collect Invoicing Information | Pior / Israel |
| Whitelist Client Domains (Email Addresses) | Austin / Shirey |
| Prepare Managed Services Contract | Israel / Client Contact |
| Send Managed Services Contract to Client Contacts | Israel / Client Contact |
| Receive Sign / Executed Contract | Israel / Client Contact |
| Obtain and Submit Insurance Certificates | Israel / Pior |
| Provide W9 to Client | Pior |
| Provide Validated Check and AC | |



| Questions | Answers |
|--|---------|
| Do you have your own ticketing system? If yes, please specify. | |
| What is your preferred method of contact? | |
| What is your time zone? | |
| When did you go live with PeopleSoft or when do you plan to go live? | |
| What PeopleSoft Application(s) do you have? | |
| How many users do you support on PeopleSoft? | |
| What other enterprise applications does PeopleSoft integrate with? | |
| Who is your primary client contact for reviewing hours and open items at the weekly business meeting? | |
| Which day / time do you prefer for the weekly business meetings? | |
| Who should have access to our SharePoint site from your side? | |
| Are you using Office 365? | |
| Are you on-premise / cloud with PeopleSoft? | |
| If on-premise, can you share the Architecture /Logical Diagram or any systems document for your PeopleSoft Lawson environment? | |
| Do you have exit documentation? Install docs? | |





Cendien: Your Questions Answered

| Consultant | Year | Bill Ver | Period | Dates | Date | Day | Hour | Customer | Project | Service Item | Notes |
|------------|------|----------|--------|-------------------------|-----------|-----|------|------------|--|---------------------------------------|-------|
| Yohan Dole | 2021 | 7 | | 04/18/2021 - 04/24/2021 | 4/21/2021 | Wed | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | CAP Metro BOD meeting | |
| Yohan Dole | 2021 | 7 | | 04/18/2021 - 04/24/2021 | 4/21/2021 | Wed | 1.00 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | Troubleshooting PO BOD is Blakes | |
| Yohan Dole | 2021 | 7 | | 04/18/2021 - 04/24/2021 | 4/22/2021 | Thu | 0.50 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | 1 PO - 39335 not picking up Manual | |
| Yohan Dole | 2021 | 7 | | 04/18/2021 - 04/24/2021 | 4/23/2021 | Fri | 0.50 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | 2 PO 39535, Line total amount is 7.7 | |
| Yohan Dole | 2021 | 7 | | 04/18/2021 - 04/24/2021 | 4/23/2021 | Fri | 0.50 | ClientName | Managed Services - ClientName Consulting Service CS - Consulting | Ticket # 4003445 | |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Mon | 1.00 | ClientName | Managed Services - ClientName Managed Service MS - Managed Serv | PO BOD Health Check Call | |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Mon | 2.00 | ClientName | Managed Services - ClientName Managed Service MS - Managed Serv | PO BOD Health Check Call | |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/26/2021 | Wed | 6.00 | ClientName | Managed Services - ClientName Managed Service MS - Managed Serv | ClientName Meeting, CapMetro BOD | |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/29/2021 | Thu | 1.00 | ClientName | Managed Services - ClientName Managed Service MS - Managed Serv | CapMetro PO Rec and PO Workflow | |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/29/2021 | Thu | 2.00 | ClientName | Managed Services - ClientName Managed Service MS - Managed Serv | CapMetro Meeting, look into CapMetro | |
| Ardash Pal | 2021 | 8 | | 04/25/2021 - 05/01/2021 | 4/30/2021 | Fri | 1.00 | ClientName | Managed Services - ClientName Managed Service MS - Managed Serv | Attend Meeting, look into BOD and Ets | |

| Total Hours Summary | | | |
|-------------------------------|--------------|-----------------|-----------------|
| Year | 2021 | 1 | |
| Bill Week | (All) | 1 | |
| Hours Summary | | | |
| Client Name | Sum of Hours | Hours Estimated | Hours Remaining |
| ClientName | 144.00 | | |
| Managed Services - ClientName | 96.00 | | |
| Consulting - Reports Project | 35.00 | 120.00 | 85.00 |
| Consulting - ABC123 Project | 11.00 | 100.00 | 89.00 |
| Grand Total | 144.00 | 220.00 | 156.00 |
| Current Week/Period | | | |
| Year | 2021 | 1 | |
| Bill Week | (All) | 1 | |
| Hours Summary | | | |
| Client Name | Sum of Hours | | |
| ClientName | 144.00 | | |
| Managed Services - ClientName | 96.00 | | |
| Consulting - Reports Project | 35.00 | | |
| Consulting - ABC123 Project | 11.00 | | |
| Grand Total | 144.00 | | |

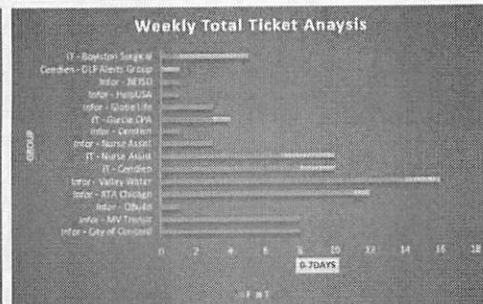
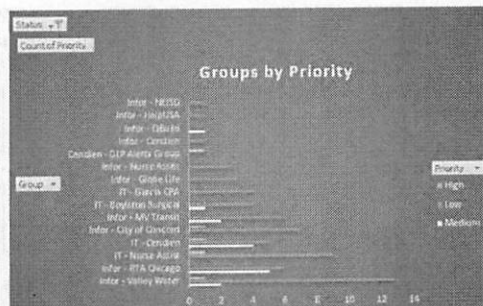
| Hours Consumed | | |
|-----------------|--------------|--------|
| Previous Period | Weeks: 01-12 | 0.00 |
| Current Period | Weeks: 05-08 | 144.00 |
| Next Period | Weeks: 01-04 | 0.00 |



Managed Services

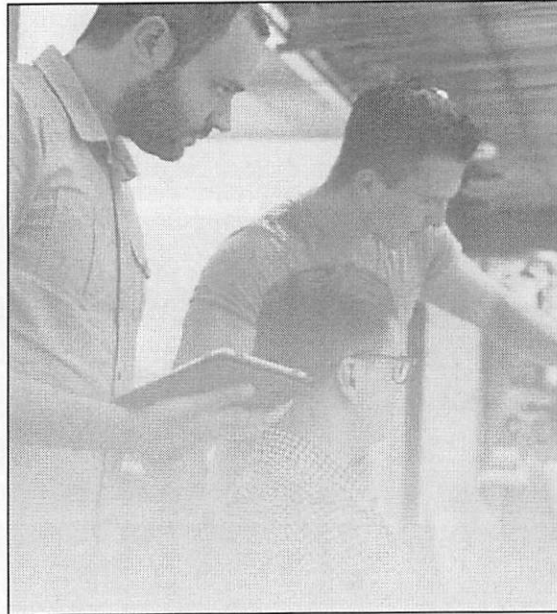


CENDIER



- Metrics on Tickets
- Metrics on Agents

Questions



Questions & Answers

Thank you for your time



Managed Services



CAM #25-0377
Exhibit 6
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380 - Infor CloudSuite Managed Services – Additional Questions

1. Upon approval by commission and final execution of the contract by both parties, explain how your firm will steer the initial information gathering, needs assessment and understanding of business processes for this contract?

Upon approval and execution of the contract, Cendien will initiate the onboarding process with the City of Fort Lauderdale. This process includes the following steps:

Welcome Package

- **Information Gathering:** Questions for gathering information about the current system, team personnel, SharePoint, ticketing site, and access to the concierge site or any other pertinent systems.
- **Assessment:** A review of open tickets and current service requests with the City and with Infor.
- **Overview of Issues:** An overview of high-level tickets and issues; begin documenting priorities for those items to be tackled.
- **Expectations:** The expectation is the City will inform Cendien those issues we need to work on/focus on. Cendien will then start assigning resources to tickets and open items.

Kick-off Meeting

- **Organize the Meeting:** Organize an initial meeting with stakeholders from both parties.
- **Objectives:** Establish communication channels, set expectations, and outline the timeline.
- **Projects:** Review potential projects and scope to plan resourcing needs and timeline to tackle them.

- a. How will you assess the city's current open issues to determine the best solutions?

We work closely with the City to assess open issues and tickets, relying on the City to guide us on what to prioritize. The City's project manager and the Cendien project manager work together to identify key areas, tickets, and issues to focus on, all while setting priorities.

Review of Open Tickets

- **Detailed Analysis:** Conduct a thorough review of all open tickets and current service requests. This includes categorizing the issues based on their nature, urgency, and impact on operations.
- **Historical Data:** Analyze historical data to identify recurring issues and patterns that may indicate underlying problems.

- b. Is this assessment a prerequisite performed as part of the onboarding, or are those hours taken from the 25 weekly service hours?

Onboarding normally takes 1 week or about 40 hours, and those hours are not billable. If the onboarding process is longer than the 40 hours, it would be billable unless we negotiate it into the contract. The assessment of open items and tickets is part of the onboarding process. Any further assessments beyond the onboarding process would incur billable hours from the weekly service hours.

Onboarding Process

- **Duration:** Onboarding normally takes 1 week or about 40 hours. These hours are not billable.
- **Extended Onboarding:** If the onboarding process exceeds 40 hours, the additional time will be billable unless negotiated into the contract beforehand.

c. Clarify your plan(s) and expectation(s) for the 30-day, 90-day and 1-year marks.

Over the first 30 days, the focus will center on completing an initial assessment to identify key issues and develop a preliminary action plan. This includes finalizing onboarding processes, ensuring all documentation and system access are in place, and conducting assessments of open tickets to prioritize immediate needs, establishing timelines, and documenting a categorized working plan. Throughout this period, ongoing support will be provided to the City while setting short-term goals for the next 60 and 90 days and identifying potential projects.

Moving into the 90-day phase, progress will be reviewed through metrics on closed tickets, service requests, and project statuses, with strategies adjusted as needed. This stage involves evaluating team performance, tracking client satisfaction, aligning team skillsets with the City's project pipeline, and discussing organizational changes to address evolving priorities.

Looking ahead to the 1-year goal, the aim is to implement impactful solutions for the City's pressing challenges, such as deploying new systems or functionality, automating processes, or resolving persistent issues. Efforts will focus on integrating the City's and Cendien's support teams, pursuing long-term strategic objectives (including any ERP improvements), and enhancing support quality through continuous feedback. The relationship with the City will be strengthened via consistent communication, adaptive strategies, and onsite meetings or team-building activities to ensure alignment with their evolving needs and foster collaborative success.

30-Day Plan

Complete the initial assessment, identify key issues, and develop a preliminary action plan.

- **Onboarding:** Ensure all the onboarding processes, including necessary documentation, assessments, and system access are complete.
- **Assessments:** Conduct initial assessments of open items and tickets to identify all immediate issues and/or priorities. Establish realistic timeline and priorities, and document a working plan. Categorize issues and priorities and status goals.
- **Support:** During the 30 days, we expect to be fully engaged and providing ongoing support to the City.
- **Goals:** Establish short-term goals for the next 60 and 90 days and address potential projects.

90-Day Plan

Review open tickets / issues / service request closed by the team and present metrics. Monitor progress, and adjust strategies as needed. Review projects and their statuses.

- **Review Performance:** Review team performance, obtain feedback for areas of improvement, track client satisfaction and seek metrics to ensure that goals are being met and issues are being closed.
- **Skillsets Requirements:** Review current and future projects to ensure proper team alignment to the City pipeline of projects and roadmap.
- **Organization Changes:** Discuss any organization changes as needed from either side.

1-Year Plan

By the one-year mark, our goal is to have implemented significant solutions to tackle the city's most pressing challenges. This may involve deploying new solutions, automating essential processes, or resolving persistent issues. We also aim to have both (City's and Cendien) support teams integrated and working well together.

- **Long-Term Goals:** Set and pursue long-term goals aligned with the City's strategic objectives, including ERP improvement projects.
- **Support Quality:** Analyze feedback during the initial year to ensure the quality of the support team is meeting the City's expectation and seek further feedback for improvements.
- **Future Changes:** Implement plans as needed for changes within the ERP system or teams.
- **Client Relationship:** Strengthen the relationship with the City by ensuring consistent communication, understanding their evolving needs, and adapting support strategies accordingly. Pursuing a couple of onsite meetings / lunches for fostering team building relationships.

2. How many other clients are assigned to the same project team members that will be servicing us?

In our managed services operations, all project team members share clients, which is typical for our setup. We have a total of 12 clients managed by a team of 38 consultants. Each team member is typically assigned to a limited number of clients to ensure high-quality service and attention to detail.

For your specific project, the project manager and key team members will be primarily dedicated to your account during the onboarding phase and the initial stages of the support engagement. This focused approach helps us understand your needs and address any immediate issues effectively. The engagement will always have a primary and a secondary project manager dedicated to the City.

Each consultant on the team maintains a utilization rate of less than 60-70%, allowing 30-40% capacity for handling spikes in workload across clients. As the project progresses and stabilizes, team members may be assigned to additional clients. The exact number of clients each team member handles can vary based on the complexity and demands of each project.

Rest assured, Cendien ensures that all team members have the capacity to provide the necessary support and maintain the quality of service across all their assignments.

3. How many resources will be dedicated to the City of Fort Lauderdale for this engagement?

Cendien will dedicate a team of skilled resources to ensure the City's success in this engagement. The exact number of resources will depend on the required support hours, the scope and complexity of issues, and the volume of incidents or service requests. While the entire team is generally available to the City as needed, the 25-hour per week engagement would limit the number of consultants that can be assigned each week. The support hours should accurately reflect the City's resource requirements. If the City requires dedicated resources on a continuous basis, we can establish a staffing agreement to meet those needs.

Typically, our support team will include a dedicated project manager, subject matter experts (SMEs), and additional resources to handle all issues and service requests, along with the support staff.

Project Manager: A dedicated project manager will oversee the entire engagement, ensuring that all tasks are completed on time and within budget. They will be the primary point of contact for the City.

Consultants / SME: Functional and Technical consultants will be assigned to handle the project, including system integration, setup, configuration, and troubleshooting. Depending on the specific needs of the project, SMEs with expertise in relevant areas (HRT, FSM, Procurement, FIN) are brought in to provide specialized knowledge and guidance.

Support Staff: Additional support staff will be available to assist with documentation, training, and any other needs that arise during the project.

4. Do you have a dedicated person working on each special project?

Yes, Cendien assigns a dedicated resource to each special project. This individual (SME) will be responsible for overseeing all aspects of the project, coordinating with the team, and serving as the primary point of contact for the client, alongside the project manager.

Having a dedicated person allows for:

- **Consistent Communication:** Ensures clear and consistent communication between the client and the project team.
- **Focused Attention:** Provides focused attention to the project's specific needs and challenges.
- **Efficient Problem Solving:** Facilitates quick and efficient problem-solving by having someone who is fully immersed in the project's details.

This approach ensures the delivery of high-quality service and the successful achievement of the project's objectives.

5. Provide the number of employees employed by your organization and how many are dedicated to Infor CloudSuite v11, Multi-tenant Managed Services.

Cendien currently employs 38 consultants. Out of these, a dedicated team of about 22 focuses on Infor CloudSuite v11, Multi-tenant Managed Services. However, the exact number of team members dedicated to your account will depend on the support hours requested as part of the managed services plan, scope and complexity of issues, special project's needs, and overall service requests ensuring that you receive the necessary expertise and attention.

a. Do you outsource to a third-party vendor or use consultants to support your client?

Cendien primarily relies on its in-house team of skilled Infor consultants to support our clients. However, to ensure we can meet all client needs effectively, we occasionally collaborate with trusted third-party vendors and independent consultants. This approach allows us to leverage specialized expertise and additional resources when necessary, ensuring high-quality service and timely project completion.

6. With regards to special projects, what is your firm's standard payment structure?

For special projects, Cendien follows a time and materials structure.

Time and Materials

- **Billing:** Clients are billed on the time spent by our team while on the project.
- **Hourly Rates:** Each team member's work is billed at an agreed-upon hourly rate.

Approval Process

- **Project Approval:** Any special project requiring more than 40 hours must be approved by the client before any work begins.
- **Estimates:** We provide detailed estimates for the time required for the project, ensuring transparency and alignment with client expectations.
- **Weekly Reports:** The project manager provides weekly consumption reports to the City for tracking purposes. The project manager also ensures there are no issues and obtains approval for the hours consumed.

Monthly Invoicing

- **Invoices:** Invoices are issued monthly, detailing the hours worked. Net 30.
- **Breakdown:** Each invoice includes a detailed breakdown of the work performed and details of the consultants working, making it easy for clients to understand the charges.

Managed Services Rate

- **Lower Rates:** Clients benefit from our lower managed services rate compared to our higher consulting rates, providing cost-effective solutions for special projects.

This payment structure ensures flexibility and transparency, allowing clients to pay for the actual work performed, rather than at a fixed price.

a. Should your team be unable to resolve an issue, will there still be a charge?

If our team is unable to resolve an issue, we strive to ensure fairness and transparency in our billing practices. Generally, if significant effort has been expended in attempting to resolve the issue, there will be a charge for the time and resources utilized. However, we handle such situations on a case-by-case basis and are open to discussing adjustments or credits if the issue remains unresolved or took longer than expected.

It's important to note that not all issues can be resolved by our team alone. Some issues may require intervention from Infor. In such cases, we will coordinate with Infor and keep you informed throughout the process. Please be mindful that some issues could be impacted by external factors beyond our control.

Our primary goal is to provide effective solutions and maintain a strong, trust-based relationship with our clients. If you have any concerns about specific scenarios, we are more than willing to discuss them to ensure mutual satisfaction.

- b. Should a project require more resources than originally quoted to meet the agreed upon schedule, do you bring on additional resources at no additional charge to fulfill the request?

If a project requires more resources than originally quoted to meet the agreed-upon schedule, Cendien will evaluate the situation carefully. Our primary goal is to ensure the project's success while maintaining transparency and fairness in our billing practices. Here are the key points:

- **Evaluation:** Cendien will assess the reasons for the additional resource requirements and determine the best course of action to meet the project's objectives. Please be mindful that scope changes or external factors could also impact schedule and resource requirements.
- **Communication:** We will communicate with the City to discuss the need for additional resources and the potential impact on the project timeline and budget.
- **Approval:** Any additional resources required will be subject to the City's approval. We will provide a detailed estimate of the additional time and costs involved.
- **Billing:**
 - **Time and Materials:** All our projects are billed on a time and materials basis. If more resources are needed or required, those resources will also bill time.
 - **Negotiation:** If agreed upon beforehand, we can make additional resources non-billable to the City. This will be clearly documented and approved by both parties.

Managed Services

Our managed services are structured to prioritize ongoing support, with smaller projects (typically under 2-3 months in duration) accommodated under this arrangement to provide the City with cost-efficient rates. Larger or more complex initiatives requiring extended timelines, specialized resources, or heightened risk mitigation will transition to a consulting agreement, which incurs rates over 47% higher than managed services. This distinction ensures transparency, aligns expectations, and optimizes value for the City while maintaining flexibility to address both immediate needs and strategic long-term goals.

Special Projects

If the additional resource requirements classify the work as a special project, it will be billed on a time and materials basis, as per our standard payment structure.

Our approach ensures that we can meet project deadlines and deliver high-quality results while maintaining transparency and fairness in our billing practices.

7. How do you allocate the money and 25 hours? Can we use 100 hours in a week and then be out for the next 3 weeks?

Cendien's allocation of hours is based on periods of four (4) weeks, with a total of 13 periods in a year. This structure is designed to be flexible and responsive to the City's needs. Allocated hours must be used within the designated period and do not carry over to subsequent periods. They also cannot be used in advance from future periods. Hours reset at the beginning of each period. If all allocated hours are consumed and exceeded within a period, the City will be responsible for overages at the same rate.

Recommendation

Based on our experience and given the number of issues discussed during the interview, we believe that a 25-hour per week allocation may not be sufficient for the City's needs. We recommend budgeting or planning for 60-80 hours per week consumption to ensure adequate support, tackling ongoing projects and timely resolution of issues.

Summary

- **Structure:** Hours are allocated in periods of four (4) weeks, 13 periods in a year.
- **Flexibility:** This structure is flexible and responsive to the City's ongoing needs.
- **Consumption:** Hours must be used within the designated period and do not carry over to subsequent periods. They also cannot be used in advance from future periods (4 weeks).
- **Reset:** Hours reset at the beginning of each period.
- **Overages:** If all hours are consumed and exceeded within a period, the City will be responsible for overages at the same rate.

Allocation of Hours

- **Standard Allocation:** Typically, 25 hours are allocated per week for managed services. These hours are used to address ongoing support and maintenance tasks and cannot be used for Special Projects unless approved beforehand.
- **Flexibility:** If you need to use more hours in a particular week, such as 100 hours, this can be accommodated. However, this would mean that the hours for subsequent weeks would be reduced accordingly. Alternatively, the City would incur overage if they don't reduce the hours in subsequent weeks within the period.
- **Period-Based:** We handle hour allocations in terms of periods, with each period consisting of 4 weeks. There are a total of 13 periods in a year. Allocated hours must be consumed within the designated period and do not carry over to subsequent periods. They also cannot be consumed in advance from future periods. Hours reset at the beginning of each period. If all allocated hours are consumed and exceeded within a period, the City will be responsible for overages at the same rate.

Approval and Planning

- **Planning:** To use a significantly higher number of hours in a single week without incurring overages, such as 100 hours and none for the subsequent weeks, requires advance planning and approval. This ensures that we can allocate the necessary resources and manage the workload effectively with our clients and staff.
- **Approval:** Any deviation from the standard allocation must be approved and documented to ensure clarity and alignment.

8. How do you determine what becomes a special project or a managed service request?

At Cendien, we differentiate between special projects and managed service requests based on several criteria:

Scope and Duration

- **Managed Service Requests:** These are typically smaller in scope and shorter in duration. They involve routine or ongoing support and maintenance tasks that can be completed within the allocated hours.
- **Special Projects:** These are larger in scope and may require more extensive planning and resources. Any request expected to take more than 40 hours or extend beyond 1-2 months is classified as a special project and treated as such.

Complexity and Resources

- **Managed Service Requests:** These requests are generally less complex and can be handled by the existing managed services team within the standard allocation of hours.
- **Special Projects:** These projects often involve higher complexity, requiring additional resources, specialized skills, and more detailed planning, coordination and tracking.

Approval and Planning

- **Managed Service Requests:** These are handled within the standard managed services agreement and do not require separate approval.
- **Special Projects:** These require client approval before any work can commence. We provide detailed estimates and project plans for client review and approval.

Managed service requests are primarily for ongoing support, issue resolution and maintenance. This ensures that routine tasks and issues are addressed promptly, allowing for smooth and efficient operations.

9. Provide examples of Absence Management projects/audits/automations you have recently done?
- What were the challenges and how were they resolved?
 - Provide the names of the jurisdictions that you worked with on the Absence Management projects?

Example 1: Absence Management Policy Audit & Compliance Fix

- **Jurisdiction:** City of Concord, California
- **Objective:** To audit the leave accrual to ensure compliance with HR policies and collective bargaining agreements.
- **Sector:** Municipal Government

Background

The City of Concord faced recurring payroll discrepancies and employee disputes tied to inconsistent leave accruals. With complex HR policies, union contracts, and evolving labor regulations, the municipality required a systematic audit to resolve compliance gaps, reduce manual workload, and rebuild trust with employees.

Audit Objective

Cendien conducted a comprehensive audit of leave accrual processes to verify alignment with organizational HR policies, regulatory requirements, and collective bargaining agreements. This included a detailed analysis of accrued leave balances, historical adjustments, and calculation methodologies to identify discrepancies, non-compliance risks, or inconsistencies with negotiated labor terms. The findings were documented in a clear report with actionable recommendations to resolve gaps, mitigate legal or financial exposure, and ensure equitable adherence to contractual obligations. Proactive alignment with these standards fosters trust, minimizes disputes, and safeguards both employee rights and organizational integrity.

- **Compliance Verification:** Ensure leave accruals align with:
 - City HR policies (e.g., vacation, sick leave).
 - Collective bargaining agreements (CBAs) across 5 union groups.
 - State/federal regulations (e.g., California Paid Sick Leave Law, FMLA).
- **Process Optimization:** Identify root causes of payroll errors and manual intervention.
- **Risk Mitigation:** Address legal, financial, and reputational exposure from non-compliance.

Challenges

- Inconsistent leave accrual calculations (errors in time-based accrual formulas).
- Misalignment between HR policies and system configuration.
- Frequent manual adjustments by Payroll and HR, leading to payroll discrepancies.

Issues Identified

- **System Configuration Errors:**
 - Accrual formulas inconsistently applied (e.g., seniority-based rates miscalculated).
 - Eligibility rules for hybrid workers misaligned with department-specific CBAs.
- **Operational Inefficiencies:**
 - 40% of leave requests required manual corrections due to outdated system logic.
 - Payroll adjustments costing 15+ hours monthly in HR/Finance labor.
- **Compliance Risks:**
 - Unapproved leave carryover violating union agreements.
 - Lack of audit trails for accrual adjustments.

Solution Implemented

- Conducted an Absence Management audit to identify policy discrepancies.
- Reconfigured leave accrual settings to match employment department contracts.
- Automated eligibility validation before approving requests.
- Comprehensive Policy-to-System Gap Analysis:
 - Mapped 20+ HR policies and CBAs to system settings, flagging 15 critical discrepancies.
 - Reviewed 2 years of historical leave data to identify patterns in errors (e.g., miscalculations during probationary periods).
- System Reconfiguration & Automation:
 - Redesigned accrual rules in Workday to reflect tiered rates based on tenure and union tiers.
 - Built automated validations:
 - Eligibility checks (e.g., probationary status, hours worked thresholds).
 - Cap enforcement (e.g., max carryover limits per CBA).
 - Integrated real-time alerts for HR to address exceptions pre-payroll.
- Training & Documentation:
 - Delivered workshops for HR on updated workflows.
 - Created a compliance playbook for future policy updates.

Results & Benefits (Outcome)

The project restored compliance, integrity and operational efficiency for Concord's 1,200+ employees.

- **Operational Efficiency:**
 - 98% reduction in manual corrections (from 200+ monthly adjustments to <5).
 - Eliminated 100% of payroll errors tied to accruals, saving 150+ annual labor hours.
- **Compliance Success:**
 - Full alignment with 5 CBAs and California labor laws, validated by legal review.
 - Audit-ready documentation for all accrual calculations and adjustments.
- **Employee Satisfaction:**
 - Disputes related to leave balances dropped by 90% within 6 months.
 - Transparent accrual tracking via employee self-service portals.

Example 2 on the next page.

Example 2: Integration of Absence Management with Payroll

- **Jurisdiction:** General Nutrition Centers (GNC) Pittsburgh, Pennsylvania
- **Objective:** Ensure seamless integration between Absence Management & Payroll.
- **Sector:** Multinational Retail/Healthcare

Background

GNC, a global retailer specializing in health and wellness products, faced persistent payroll inaccuracies across its Canadian operations due to misaligned absence management and payroll systems. Manual data transfers, regional complexities in Canadian labor laws, and siloed systems led to overpayments, underpayments, and compliance risks. The organization sought to automate and synchronize these systems to ensure accuracy, reduce administrative burden, and align with Canada's Employment Standards Act (ESA) and provincial regulations.

Project Objective

- **System Integration:** Achieve real-time synchronization between absence management and payroll platforms.
- **Compliance Assurance:** Align leave calculations with Canadian federal/provincial laws (e.g., Ontario ESA, Quebec Labor Standards).
- **Error Reduction:** Eliminate manual data entry and discrepancies in leave-related payroll deductions.
- **Audit Preparedness:** Create transparent reporting for HR audits and regulatory reviews.

Challenges and Issues Identified

- **System Disconnects:** Leave balances (e.g., vacation, sick leave) failed to update in payroll, causing 15% of employees to experience over/underpayments monthly. Provincial variations in accrual rules.
- **Manual Processes:** HR teams were spending 20+ hours monthly reconciling spreadsheets to resolve discrepancies. Lack of automated alerts for policy violations (exceeding statutory carryover limits).
- **Compliance Gaps:** Inconsistent application for sick leave. No audit trail for adjustments, increasing liability during government inspection.

Solution Implemented

- Built real-time data synchronization between Absence Management & Payroll.
- Developed a custom reconciliation report to detect discrepancies.
- Automated leave deduction calculations, ensuring correct payroll deductions.
- Created a compliance tracking system for custom leave calculations.

Results & Benefits (Outcome)

GNC's integration of absence management and payroll systems resolved critical operational and compliance gaps while enhancing scalability.

- **Operational Efficiency:**
 - 95% reduction in payroll errors (from 130+ monthly discrepancies to <5).
 - Eliminated 20+ hours/month of manual reconciliation labor.
- **Compliance Success:**
 - 100% adherence to Canada's federal/provincial leave laws, verified by third-party auditors.
 - Automated alerts reduced policy violations by 80% (excess vacation carryover).
- **Employee & HR Experience:**
 - Payroll accuracy improved employee trust, reducing related HR inquiries by 70%.
 - Self-service portals enabled employees to view real-time leave balances and payroll impact.

10. How do you handle service requests and support tickets?

We handle service requests and tickets through a process to ensure a timely and effective resolution.

Ticket Submission

- **Support Portal:** The City can submit service requests and support tickets through our dedicated support portal Freshdesk. This portal allows the City to track the status of their tickets and communicate directly with our team. We are open to also using your ticketing system, but we require access to it and the ability to run reports.
- **Email, Messaging and Phone:** The City can also submit requests via email, Microsoft Teams or phone, providing flexibility in how they reach out for support. And also, through the City's dedicated project manager, the City can submit requests and tickets.

Categorization and Prioritization

- **Categorization:** Upon receipt, tickets are categorized based on their nature, urgency, and impact. This helps in prioritizing the tickets and resources effectively.
- **Prioritization:** Tickets are prioritized to ensure that critical issues are addressed promptly. High-priority tickets receive immediate attention, while lower-priority tickets are scheduled accordingly.

Resource Assignment

- **Resource Allocation:** Tickets are assigned to the appropriate team members based on their expertise and availability, ensuring that each issue is handled by the most qualified personnel. Our entire team reviews all tickets weekly to ensure proper coverage, and project managers assess staff needs on a weekly basis.

Ticket Resolution

- **Initial Response:** The City receives an initial response acknowledging their request and providing an estimated timeline for resolution.
- **Troubleshooting and Resolution:** Our team works diligently to troubleshoot and resolve the issue. If the issue requires intervention from Infor, we coordinate with them and keep the City informed throughout the process.
- **Resolution:** Once the ticket is resolved, resolution is communicated to both the City's project manager and the ticket owner (end user) and the ticketing system is updated with documentation of the steps taken to resolve the issues. Finally, the ticket is closed.

Communication

- **Regular Updates:** The City receives regular updates on the status of their tickets, ensuring transparency and keeping them informed of progress.
- **Support Portal:** The City can log into the City portal at any time to check the status of their tickets and view detailed information about the resolution process.
- **Project Manager:** The City's dedicated project manager will also provide ongoing updates of tickets. A weekly call with the project managers is part of our normal operations to ensure sufficient communication for updates is taking place.

Closure and Feedback

- **Confirmation:** Once an issue is resolved, we confirm with the City that the solution is satisfactory before closing the ticket.
- **Feedback:** The City is encouraged to provide feedback on the support experience, helping us continuously improve our services.

11. What reporting tools will be in place to keep us informed of project status?

To keep the City informed of project status, Cendien utilizes a variety of tools and practices. Our methodology combines industry-leading tools to ensure precision, transparency, and adaptability across all initiatives.

For complex project planning, we leverage Microsoft Project to design detailed schedules, allocate resources efficiently, and track progress against timelines, budgets, and milestones. This tool enables granular reporting through Gantt charts and workload analytics, ensuring alignment with project objectives. Simpler workflows, such as ticket management, are supported by Microsoft Excel-based dashboards, which provide real-time visibility into task statuses, priorities, and resolution timelines. For collaborative project execution, we utilize Monday.com to create dynamic, customizable dashboards and work breakdown structures (WBS), which are shared with clients to foster transparency and joint ownership of deliverables. This approach—pairing Excel's flexibility for day-to-day operations with Microsoft Project's robustness for strategic initiatives and Monday.com agility for client collaboration—ensures scalability, accountability, and seamless communication across all phases of engagement. Regular updates and shared access to these platforms empower stakeholders to monitor progress, address risks proactively, and align priorities in real time.

Project Management

- **Microsoft Project:** Used for complex project planning, scheduling, resource allocation, and progress tracking. It provides detailed reports on project timelines, milestones, and budget management.
- **Excel and Monday.com:** Offers customizable reporting dashboards for real-time visibility on the project or tickets statuses. For tickets, we mainly use Microsoft Excel-based reports. For projects, we primarily use Microsoft Project and/or Monday.com

Regular Status Reports

- **Weekly Status Reports:** Summarize the work completed during the week, highlight any issues or risks, and outline the plan for the upcoming week. Excel based reports.
- **Monthly Status Reports:** Provide a more comprehensive overview of the project's progress, including budget and schedule summaries, action items, and any significant changes or updates. Excel based reports.

Client Portal

- **Access to Reports:** The City can access all project reports through a dedicated client portal in Microsoft SharePoint (O365). This portal allows for real-time tracking of project status, viewing detailed reports, and communicating directly with the project team.

Meetings and Updates:

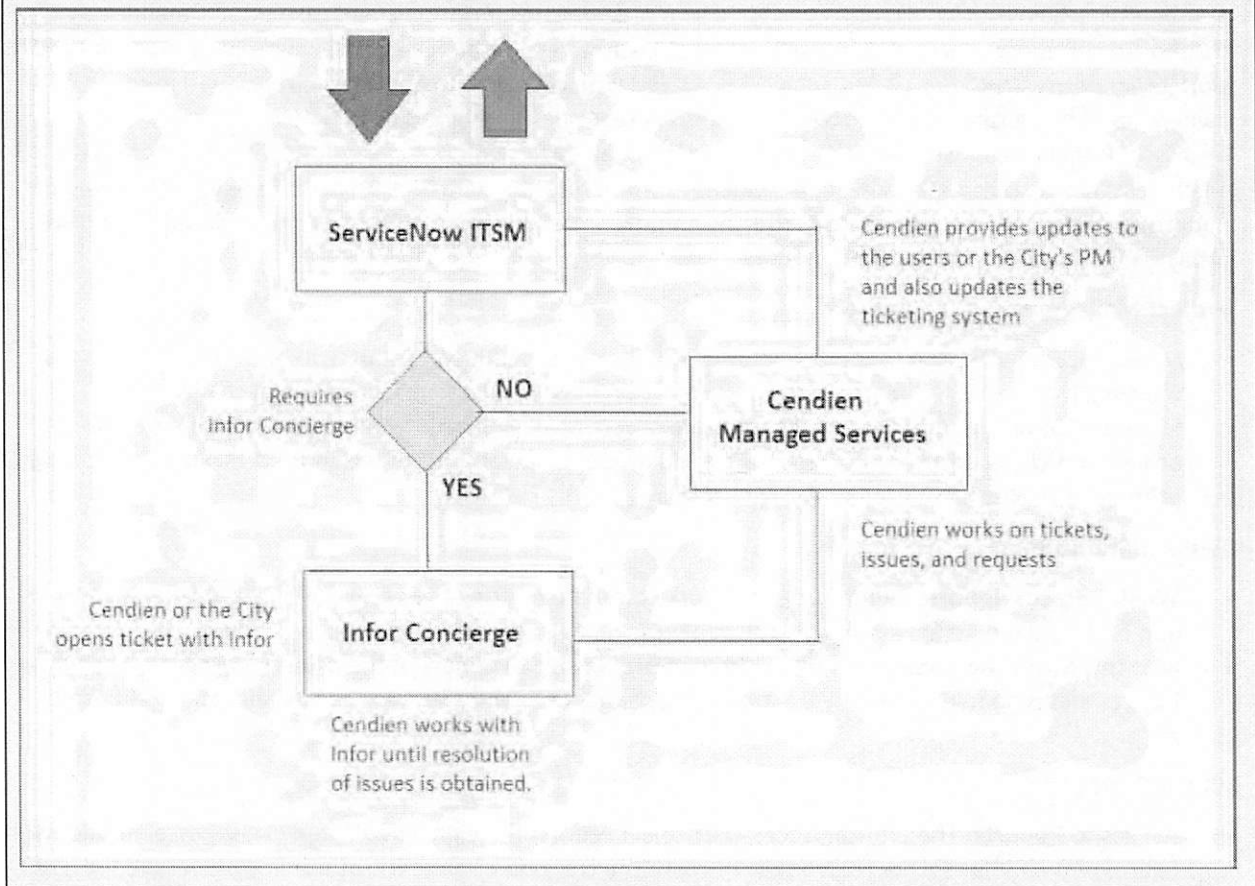
- **Regular Meetings:** Schedule regular update meetings with key stakeholders to discuss project progress, address any concerns, and ensure alignment with project goals.
- **Ad-hoc Updates:** Provide ad-hoc updates as needed to keep the City informed of any critical developments or changes.

12. Are you open to using the city's SharePoint for document management?

Absolutely! We are open to using the City's SharePoint for document management. Utilizing SharePoint can streamline collaboration, ensure secure document storage, and provide easy access to project-related files for all stakeholders.

13. Provide a process flow diagram showing how your Managed Services will interact with Infor Concierge Services? Our ticketing system is divided into two parts today; Entry at ServiceNow ITSM and Infor Concierge Support Services, please identify your role in the future and the relationship between CoFTL, Infor Concierge Support Services, and your organization.

In our Managed Services process, users simply need to log their tickets or issues in ServiceNow. If necessary, Cendien can then open tickets with Infor on the City's behalf. In some cases, the involvement of Infor concierge may not be required. Cendien will work diligently to resolve these issues and provide timely updates to both the users and the City's project manager, as well as update the ServiceNow ticket. See below.



14. Describe your services to train Business End Users with the varied Infor CloudSuite modules and the method to deliver training.

We recommend using Infor Campus for all formal training needs. However, we can offer small group sessions and individualized training upon request. These sessions are primarily based on a train-the-trainer approach and require preparation time. Therefore, they must be scheduled with ample notice and planned to ensure the availability of the appropriate resources.

Sessions can be conducted via Microsoft Teams, Zoom, or onsite with travel reimbursement approval. To ensure the availability of the appropriate training resources, these sessions must be approved and coordinated in advance.