

## References

Services Type	Services Description
Village of Hinsdale – January 2019 – January 2021	
Village Background	<p>Products Selected: <b>Tyler Munis, Tyler</b> Incode</p> <p>No dedicated implementation staff</p> <p>Small project implementation team</p> <p>No business analysts, no project manager</p> <p>IT Support - Outsourced</p> <p>SaaS Implementation ERP</p> <p>Multiple system integrations</p> <p>Budget: \$19,383,018</p> <p>Population: 17,705</p>
Contacts	<p>Emily Wagner, Administration Manager (630) 789-7005</p> <p>Brad Bloom, Asst. Village Manager/ Dir. Of Public Safety (630) 789-7007</p>
Contract Negotiations	<b>Tyler Munis</b> ERP System
	<b>Tyler</b> Incode Parking & Citation System
Conversion Strategic Plan & Data Clean-up	<p>Developed a strategic plan for identification, clean up, and conversion of data. Coordinated with departments to <b>locate relevant data</b> sources, identify specific department data needs, and develop strategy to accommodate departments and Village-wide need for <b>centralized and consistent data</b>. <b>Facilitated a plan for standardization of data entry and maintenance</b> as well as project plan and timeline for clean-up actions for data conversion.</p> <ul style="list-style-type: none"> <li>Property File Strategic Plan Development/Data Clean-up</li> <li>Customer File Strategic Plan Development/Data Clean-up</li> <li>Permit Record Strategic Plan Development/Data Clean up</li> </ul>

Services Type	Services Description
Village of Hinsdale – (continued)	
Project Management	<p>Project Management <b>Tyler Munis</b> ERP Implementation</p> <ul style="list-style-type: none"> <li>❖ Chart of Accounts</li> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Accounts Payable</li> <li>❖ Purchasing</li> <li>❖ Accounts Receivable</li> <li>❖ Miscellaneous Billing</li> <li>❖ Bank Reconciliation</li> <li>❖ Project Accounting</li> <li>❖ Grant Management</li> <li>❖ Personnel Management</li> <li>❖ Payroll Processing</li> <li>❖ Benefit Management</li> <li>❖ Personnel Actions</li> <li>❖ Accrual Tracking</li> <li>❖ Recruiting</li> <li>❖ Employee Self-Service</li> <li>❖ Tyler Content Manager</li> <li>❖ Tyler Cashiering</li> <li>❖ Property Management</li> <li>❖ Permitting</li> <li>❖ Inspections</li> <li>❖ Planning/Zoning</li> <li>❖ Code Enforcement</li> <li>❖ Business Licensing</li> <li>❖ Utility Services</li> <li>❖ Meter Inventory</li> <li>❖ Meter reading</li> <li>❖ Utility Billing</li> <li>❖ Utility Service Orders</li> </ul>
Process & Strategy Consulting	<p>Process improvement consulting to assist with setting direction for the implementation of the new <b>Tyler Munis</b> ERP functionality</p> <ul style="list-style-type: none"> <li>• Purchasing &amp; requisitions</li> <li>• Accounts payables</li> <li>• Permit applications &amp; issuance</li> <li>• Inspection scheduling and completion</li> <li>• Code enforcement/violations</li> <li>• License application &amp; renewals</li> <li>• Utility billing &amp; service requests</li> <li>• Payroll Processing</li> </ul>

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Village of Hinsdale – (continued)																							
Desktop Procedures	<p>Development of desktop procedures tailored to the Village's processes, policies, procedures, and <b>Tyler Munis</b> configuration.</p> <ul style="list-style-type: none"> <li>• <b>Tyler Munis</b> General Ledger, Month End Close, and Year End Close</li> <li>• <b>Tyler Munis</b> Budget Development &amp; Adoption</li> <li>• <b>Tyler Munis</b> Grant Management</li> <li>• <b>Tyler Munis</b> Project Accounting</li> <li>• <b>Tyler Munis</b> Accounts Payable</li> <li>• <b>Tyler Munis</b> Purchasing &amp; Requisitions</li> <li>• <b>Tyler Munis</b> Miscellaneous Billing &amp; Accounts Receivable</li> <li>• <b>Tyler Munis</b> Utility Billing</li> <li>• <b>Tyler Munis</b> Payroll: Time Entry &amp; Leave Management</li> <li>• <b>Tyler Munis</b> HR Management</li> <li>• <b>Tyler Munis</b> Permit, Inspection and Planning</li> <li>• <b>Tyler Munis</b> Code enforcement</li> <li>• <b>Tyler Munis</b> Licensing</li> </ul>																						
Go Live Checklist	<p>Development of Go Live checklists based on the Village's implementation scope, process, and setup decisions.</p> <table border="0"> <tbody> <tr> <td>❖ General Ledger</td><td>❖ Benefit Administration</td></tr> <tr> <td>❖ Budget</td><td>❖ Utility Accounts</td></tr> <tr> <td>❖ Accounts Payable</td><td>❖ Water Billing Process</td></tr> <tr> <td>❖ Accounts Receivable</td><td>❖ Meter Inventory</td></tr> <tr> <td>❖ General Billing</td><td>❖ Service Order</td></tr> <tr> <td>❖ Purchasing</td><td>❖ Delinquency Management</td></tr> <tr> <td>❖ Cash Management</td><td>❖ Permits &amp; Inspections</td></tr> <tr> <td>❖ Project Accounting</td><td>❖ Planning/Zoning Petitions</td></tr> <tr> <td>❖ Grant Management</td><td>❖ Plan Review</td></tr> <tr> <td>❖ Payroll Processing</td><td>❖ Code Enforcement</td></tr> <tr> <td>❖ Personnel Management</td><td>❖ Licensing</td></tr> </tbody> </table>	❖ General Ledger	❖ Benefit Administration	❖ Budget	❖ Utility Accounts	❖ Accounts Payable	❖ Water Billing Process	❖ Accounts Receivable	❖ Meter Inventory	❖ General Billing	❖ Service Order	❖ Purchasing	❖ Delinquency Management	❖ Cash Management	❖ Permits & Inspections	❖ Project Accounting	❖ Planning/Zoning Petitions	❖ Grant Management	❖ Plan Review	❖ Payroll Processing	❖ Code Enforcement	❖ Personnel Management	❖ Licensing
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Services Type	Services Description
Village of Hinsdale – (continued)	
Post Live Review	<p>Conducted post live review session with Village personnel to capture any open issues, assess implementation outcomes met Village goals, and <b>develop an action plan</b> to close open issues or implement any outstanding functionality. Conducted analysis and provided report on project implementation outcomes.</p> <ul style="list-style-type: none"> <li>❖ Purchasing &amp; requisitions</li> <li>❖ Accounts payables</li> <li>❖ Payroll Processing</li> <li>❖ Utility billing &amp; service requests</li> <li>❖ Permit applications &amp; issuance</li> <li>❖ Inspection scheduling &amp; completion</li> <li>❖ Code enforcement/violations</li> <li>❖ License application &amp; renewals</li> </ul>

Services Type	Services Description
Village of Addison – January 2017 – December 2020	
Village Background	<p>Products Selected: <b>Tyler</b> New World, Intime, CityView, Lucity, CitySourced</p> <p>No dedicated implementation staff</p> <p>Small project implementation team</p> <p>No business analysts, no project manager</p> <p>IT Support in-house</p> <p>SaaS Implementation ERP</p> <p>Multiple system integrations</p> <p>Budget: \$66,550,733</p> <p>Population: 36,820</p>
Contacts	<p>Roseanne Benson, Finance Director (630) 693-7561</p> <p>Joe Block, Village Manager, <i>Retired Dec. 2018</i> (630) 693-7510</p> <p>Rick Federighi, Public Works Director (630) 620-2020</p> <p>Director Hayden, Police Department (630) 693-7902</p> <p>Deputy Chief Brian Goss, Police Department (630) 693-7943</p>
Strategy & Organizational Assessment	<p><b>Village-wide assessment</b> of all department processes and technology needs to development of a strategic plan for the Village. The strategic plan incorporated recommendations for system solutions to upgrade, replace, or integrate technology Village-wide. The recommendation included functional requirements and integrations to support inter-departmental communications, automation, opportunities for efficiencies and process improvement.</p>
System Selection	Enterprise Asset Management RFP and Selection
	Public Safety Scheduling System RFP and Selection
	Community Development System RFP and Selection
	<b>Tyler</b> New World ERP RFP and Selection
	Customer Service/Citizen Engagement Solution

Services Type	Services Description
Village of Addison – (continued)	
Contract Negotiations	Enterprise Asset Management System including multiple integrations
	Public Safety Scheduling System with payroll integration
	Community Development System with ERP integration
	<b>Tyler</b> New World ERP System including system modifications and integrations with multiple systems
Project Management & Project Support	Project Management of <b>multiple concurrent systems implementations</b> with <b>integrations</b> between each system including coordination and oversight of <b>simultaneous go live dates</b> across systems with dependent integrations.
	Project Management <b>Tyler</b> New World ERP Implementation
	<div>❖ Chart of Accounts</div> <div>❖ General Ledger</div> <div>❖ Budget</div> <div>❖ Accounts Payable</div> <div>❖ Purchasing</div> <div>❖ Contract Management</div> <div>❖ Accounts Receivable</div> <div>❖ Miscellaneous Billing</div> <div>❖ Revenue Collection</div> <div>❖ Bank Reconciliation</div> <div>❖ Project Tracking</div> <div>❖ <i>Meter inventory interface</i></div> <div>❖ Cashiering interface</div>
	<div>❖ Utility Services</div> <div>❖ Meter Inventory</div> <div>❖ <i>Meter reading</i></div> <div>❖ <i>Utility Service Orders</i></div> <div>❖ Personnel Management</div> <div>❖ Payroll Processing</div> <div>❖ Benefit Management</div> <div>❖ Personnel Actions</div> <div>❖ Time Entry</div> <div>❖ Time &amp; Attendance interface</div> <div>❖ Leave Management</div> <div>❖ Accrual Tracking</div> <div>❖ Employee Self-Service</div> <div>❖ Service Order interface</div>
	Project Management Enterprise Asset Management Implementation
	Project Management Public Safety Scheduling System Implementation
	<i>Project Management Community Development System Implementation</i>
	Management of integrations across multiple implemented systems

Services Type	Services Description
Village of Addison – (continued)	
Implementation & Configuration Assistance	<p>Developed configuration options <b>incorporating system functionality</b> to achieve Village's process, information tracking, and reporting requirements accounting for the <b>Village plan for each module</b> and the <b>overall system</b>.</p> <ul style="list-style-type: none"> <li>• Accounts Payable/Vendor Management Setup Assistance for <b>Tyler New World</b></li> <li>• Contract Management Setup Assistance for <b>Tyler New World</b></li> <li>• Purchasing/Purchase Order Setup Assistance for <b>Tyler New World</b></li> </ul>
Conversion Strategic Plan & Data Clean-up	<p>Developed a strategic plan for identification, clean up, and conversion of data. Coordinated with departments to <b>locate relevant data</b> sources, identify specific department data needs, and develop strategy to accommodate departments and Village-wide need for <b>centralized and consistent data</b>. <b>Facilitated a plan for standardization of data entry and maintenance</b> as well as project plan and timeline for clean-up actions for data conversion.</p> <ul style="list-style-type: none"> <li>• Property File Strategic Plan Development/Data Clean-up</li> <li>• Customer File Strategic Plan Development/Data Clean-up</li> <li>• Permit Record Strategic Plan Development/Data Clean up</li> </ul>
User Acceptance Testing	<p>Development of User Acceptance Test scripts for <b>Tyler New World modules</b>. <b>Tests were tailored to Village processes</b> based on configuration decisions gathered and documented by Baecore Group during New World Analysis sessions, decisions recorded in project board by Village and Baecore personnel, and as part of process improvement and implementation support services.</p> <ul style="list-style-type: none"> <li>• General Ledger</li> <li>• Accounts Payable</li> <li>• Purchasing</li> <li>• Contract Management</li> <li>• Miscellaneous Billing</li> <li>• Revenue Collection</li> </ul>

Services Type	Services Description
Village of Addison – (continued)	
Process & Strategy Consulting	<p>Process improvement consulting to assist with setting direction for the implementation of the new City View functionality including integration with <b>Tyler Cashiering to maintain a central client record.</b></p> <ul style="list-style-type: none"> <li>• Permit applications &amp; issuance</li> <li>• Zoning applications &amp; approvals</li> <li>• Inspection scheduling and completion</li> <li>• Code Enforcement/Violations</li> <li>• Rental Property Inspections</li> <li>• Business &amp; Liquor Licensing</li> </ul>
	<p>Process improvement consulting for the new Lucity work order, job costing and asset management system. Implemented the EAM functionality while eliminating manual tracking of work and duplicate work efforts to track and report time for payroll resulting in a <b>full integration with Tyler payroll.</b></p> <ul style="list-style-type: none"> <li>• Asset management and reporting</li> <li>• Preventative maintenance</li> <li>• Work order management</li> <li>• Inventory management</li> <li>• Contractor tracking &amp; management</li> <li>• Timesheet submission &amp; approval</li> </ul>
	<p>Process improvement consulting to assist with setting direction for the implementation of the new <b>Tyler New World</b> functionality</p> <ul style="list-style-type: none"> <li>• Accounts Payable</li> <li>• Purchasing</li> </ul>
	<p>Process improvement consulting to implement InTime functionality eliminating manual payroll processing. The implementation provided transparency, reporting, automation and integration with Tyler payroll.</p> <ul style="list-style-type: none"> <li>• Public Safety scheduling</li> <li>• Leave requests and workflow</li> <li>• Training tracking and management</li> </ul>



Services Type	Services Description								
Village of Addison – (continued)									
Integration Support	<p>Provide support for the integration of <b>Tyler</b> New World ERP with the other systems implemented by the Village including <b>documentation of the interface functionality</b> and supporting the Village to communicate the required functionality to the vendor. Provide support for <b>testing the interfaces</b>.</p> <ul style="list-style-type: none"> <li>• <b>Tyler</b> New World Payroll import interface</li> <li>• <b><i>Tyler New World Utility Billing service order &amp; meter inventory interface</i></b></li> <li>• <b>Tyler</b> New World Revenue Collection/Cashiering interface</li> </ul>								
Desktop Procedures	<p>Development of desktop procedures tailored to the Village's processes, policies, procedures, and <b>Tyler</b> New World configuration.</p> <ul style="list-style-type: none"> <li>• <b>Tyler</b> New World Purchasing</li> <li>• <b>Tyler</b> New World Contract Management</li> <li>• <b>Tyler</b> New World Inquiry and Reporting</li> </ul>								
Training Workshops	<p>Provided, hands-on end-user training for Village personnel <b>customized for the Village processes, policies and procedures</b>. Training focused on supporting personnel to learn and understand the process as well as become comfortable using the new system.</p> <ul style="list-style-type: none"> <li>• <b>Tyler</b> New World Purchasing</li> <li>• <b>Tyler</b> New World Contract Management</li> <li>• <b>Tyler</b> New World Inquiry and Reporting</li> </ul>								
Go Live Checklist	<p>Development of Go Live checklists based on the Village's implementation scope, process, and setup decisions. Checklists included critical items for completion and validation in preparation of Go Live</p> <table> <tr> <td>❖ Chart of Accounts</td><td>❖ Purchasing</td></tr> <tr> <td>❖ General Ledger</td><td>❖ Contract Management</td></tr> <tr> <td>❖ Budget</td><td>❖ Accounts Receivable</td></tr> <tr> <td>❖ Accounts Payable</td><td>❖ Miscellaneous Billing</td></tr> </table>	❖ Chart of Accounts	❖ Purchasing	❖ General Ledger	❖ Contract Management	❖ Budget	❖ Accounts Receivable	❖ Accounts Payable	❖ Miscellaneous Billing
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Services Type	Services Description
Village of Addison – (continued)	
Post Live Review	<p>Conducted post live review session with Village personnel to capture any open issues, assess implementation outcomes met Village goals, and <b>develop an action plan</b> to close open issues or implement any outstanding functionality. Conducted analysis and provided report on project implementation outcomes.</p> <ul style="list-style-type: none"> <li>❖ Chart of Accounts</li> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Accounts Payable</li> <li>❖ Purchasing</li> <li>❖ Contract Management</li> <li>❖ Accounts Receivable</li> <li>❖ Miscellaneous Billing</li> <li>❖ Vendor Management</li> </ul>

Services Type	Services Description
City of Naperville – October 2016 - Present	
City Background	<p>Systems Selected: <b>Tyler Munis</b>, <b>Tyler</b> EnerGov, <b>Tyler TCM</b>, City Works,</p> <p>Full-time dedicated Project Manager – ERP sole responsibility</p> <p>Multiple business analysts in IT</p> <p>IT support in-house</p> <p>SaaS Implementation</p> <p>Budget: \$387,169,092</p> <p>Population: 147,682</p>
Contacts	<p>Kim Schmidt, Procurement Manager, (630) 420-4162</p> <p>Rachel Mayer, Finance Director (630) 420-6052</p> <p>Steve Cope, ERP Manager (630) 305-5265</p>
Contract Negotiations	<b>Tyler Munis</b> ERP System, Tyler EnerGov Community Development
Project Management	Project Management and project support services for <b>Tyler Munis</b> ERP Implementation.
	<p>Project Management <b>Tyler Munis</b> ERP Financials Implementation</p> <ul style="list-style-type: none"> <li>❖ Chart of Accounts</li> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Accounts Payable</li> <li>❖ Inventory</li> <li>❖ Purchasing</li> <li>❖ Contract Management</li> <li>❖ Accounts Receivable</li> <li>❖ Miscellaneous. Billing</li> <li>❖ Cash Management</li> <li>❖ Tyler Cashiering</li> <li>❖ Project Tracking</li> <li>❖ Grant Management</li> <li>❖ Fixed Assets</li> </ul>
PM Support Services	<p><b>Tyler Munis</b> Utility Billing project planning support services with evaluation of Tyler project plan with recommendations for efficient and cost-effective project management.</p> <ul style="list-style-type: none"> <li>❖ Utility Accounts</li> <li>❖ Utility Services</li> <li>❖ Meter Inventory</li> <li>❖ Meter Reading Interface</li> <li>❖ Service Orders</li> <li>❖ Delinquency Processing</li> </ul>

Services Type	Services Description												
City of Naperville – (continued)													
Process and Strategy Consulting	<p>Process improvement consulting to assist with setting direction for the implementation of the new <b>Tyler Munis</b> functionality and the integration with the Harris CityWorks EAM solution</p> <ul style="list-style-type: none"> <li>• Inventory Procurement</li> <li>• Surplus Property</li> </ul>												
User Acceptance Testing	<p>Development of User Acceptance Test scripts for <b>Tyler Munis modules tailored to City process and configuration decisions</b> gathered and documented by Baecore Group during Munis <b>Analysis sessions</b> and <b>as part of process improvement and implementation support services.</b></p> <table> <tr> <td>❖ Chart of Accounts</td><td>❖ Accounts Receivable</td></tr> <tr> <td>❖ General Ledger</td><td>❖ Miscellaneous. Billing</td></tr> <tr> <td>❖ Budget</td><td>❖ Cash Management</td></tr> <tr> <td>❖ Accounts Payable</td><td>❖ Tyler Cashiering</td></tr> <tr> <td>❖ Purchasing</td><td>❖ Project Tracking</td></tr> <tr> <td>❖ Contract Management</td><td>❖ Grant Management</td></tr> </table>	❖ Chart of Accounts	❖ Accounts Receivable	❖ General Ledger	❖ Miscellaneous. Billing	❖ Budget	❖ Cash Management	❖ Accounts Payable	❖ Tyler Cashiering	❖ Purchasing	❖ Project Tracking	❖ Contract Management	❖ Grant Management
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Go Live Checklist	<p>Provided Go Live checklist designed for the City's based on their implementation scope, process, and setup decisions. Checklist included critical items for completion and validation in preparation of Go Live</p> <table> <tr> <td>❖ Chart of Accounts</td><td>❖ Accounts Receivable</td></tr> <tr> <td>❖ General Ledger</td><td>❖ Miscellaneous. Billing</td></tr> <tr> <td>❖ Budget</td><td>❖ Cash Management</td></tr> <tr> <td>❖ Accounts Payable</td><td>❖ Tyler Cashiering</td></tr> <tr> <td>❖ Purchasing</td><td>❖ Project Tracking</td></tr> <tr> <td>❖ Contract Management</td><td>❖ Grant Management</td></tr> </table>	❖ Chart of Accounts	❖ Accounts Receivable	❖ General Ledger	❖ Miscellaneous. Billing	❖ Budget	❖ Cash Management	❖ Accounts Payable	❖ Tyler Cashiering	❖ Purchasing	❖ Project Tracking	❖ Contract Management	❖ Grant Management
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Services Type	Services Description
City of Wheaton – February 2013 – August 2017	
City Background	<p>Systems Selected: <b>Tyler Munis</b>, Tyler TCM</p> <p>Full-time dedicated Business Analysts (2 part-time) – ERP implementation primary/only responsibility</p> <p>IT support in-house</p> <p>SaaS implementation</p> <p>Budget: \$80,178,937</p> <p>Population: 55,373</p>
Contact	Chad Michaels, IT Director, (630) 260-2179
Project Management	<p>Project Management of <b>Tyler Munis</b> ERP Implementation</p> <ul style="list-style-type: none"> <li>❖ Chart of Accounts</li> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Accounts Payable</li> <li>❖ Purchasing</li> <li>❖ Contract Management</li> <li>❖ Accounts Receivable</li> <li>❖ General Billing</li> <li>❖ Project Tracking</li> <li>❖ False Alarm Billing</li> <li>❖ Tyler Cashiering</li> <li>❖ Personnel Management</li> <li>❖ Payroll Processing</li> <li>❖ Benefit Management</li> <li>❖ Personnel Actions</li> <li>❖ Employee Self-Service</li> <li>❖ Tyler Content Manager</li> <li>❖ Tyler Forms</li> <li>❖ Central Property</li> <li>❖ Permitting</li> <li>❖ Inspections</li> <li>❖ Planning/Zoning</li> <li>❖ Code Enforcement</li> <li>❖ Business Licenses</li> <li>❖ Parking Tickets</li> <li>❖ Utility Services</li> <li>❖ Meter Inventory</li> <li>❖ Meter reading</li> <li>❖ Utility Billing</li> <li>❖ Utility Service Orders</li> </ul>

Services Type	Services Description
City of Wheaton – (continued)	
Desktop Procedures	Desktop Procedures for <b>Tyler Munis</b> modules <ul style="list-style-type: none"> <li>• Budget Creation</li> <li>• Parking Tickets</li> <li>• General Ledger</li> <li>• Year-end processing</li> <li>• Business License</li> <li>• Central Property Management</li> <li>• Utility Billing Processing Checklist</li> </ul>
Process and Strategy Consulting	Process improvement consulting to assist with setting direction for the implementation of the new <b>Tyler Munis</b> functionality <ul style="list-style-type: none"> <li>• Budget Creation and Adoption</li> <li>• General Ledger</li> <li>• Accounts Payable</li> <li>• Parking Tickets</li> <li>• General Billing</li> <li>• Personnel Actions</li> <li>• Benefit Enrollment</li> <li>• Permits &amp; Inspections</li> <li>• Code Enforcement</li> <li>• False Alarm Management and Billing</li> <li>• Purchasing</li> <li>• Contract Management</li> <li>• Central Property</li> <li>• Business License Customer Self-Service</li> </ul>
Implementation & Setup Assistance	Provided direction in the development of the <b>Tyler Munis</b> community development permit and inspection code schema/setup design to provide granular reporting on permit information as required by the Community Development department

Services Type	Services Description
City of Wheaton – (continued)	
Go Live Checklist	<p>Provided Go Live checklist tailored to the City based on implementation scope, process, and setup decisions. Checklist included critical items for completion and validation in preparation of Go Live.</p> <ul style="list-style-type: none"> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Accounts Payable</li> <li>❖ Accounts Receivable</li> <li>❖ General Billing</li> <li>❖ Cashiering</li> <li>❖ Parking Tickets</li> <li>❖ Business License</li> <li>❖ Utility Accounts</li> <li>❖ Utility Services</li> <li>❖ Meter Inventory</li> <li>❖ Meter reading</li> <li>❖ Utility Billing</li> <li>❖ Utility Service Orders</li> </ul>
Post Live Review	<p>Conducted post live review session with City personnel to capture any open issues, assess implementation outcomes met City goals, and develop an action plan to close open issues or implement any outstanding functionality.</p> <ul style="list-style-type: none"> <li>❖ Utility Accounts</li> <li>❖ Utility Services</li> <li>❖ Meter Inventory</li> <li>❖ Delinquency Processing</li> <li>❖ Meter reading</li> <li>❖ Utility Billing</li> <li>❖ Utility Service Orders</li> <li>❖ Service Shut Off Process</li> </ul>

Services Type	Services Description
City of Joliet–Project Services February 2013 – December 2017 Business Intelligence Dashboards – October 2017-Present	
City Background	<p>Products Selected: <b>Tyler Munis, Tyler Content Manager, Tyler Cashiering</b></p> <p>No dedicated implementation staff</p> <p>No business analysts, no project manager</p> <p>IT Support in-house (break/fix and network support contracted)</p> <p>SaaS Implementation ERP</p> <p>Budget: \$259,826,462</p> <p>Population: 148,462</p>
Contact	<p>Chris Sternal, Enterprise Application Services Manager (815) 724-4117</p> <p>Kendall Jackson, Director of Community Development (815) 724-4040</p> <p>Allison Swisher, Director of Public Utilities (815) 724-4220</p>
Selection & Board Presentation	Enterprise Asset Management RFP and Selection
	<b>Tyler Munis</b> ERP Board Justification and Presentation
Contract Negotiations	<b>Tyler Munis</b> ERP System
	Enterprise Asset Management RFP and Selection
Business Intelligence	Design and development of business intelligence dashboards and custom reporting for Community Development. Provided actionable information to track and manage open applications, inspections and plan reviews to support achievement of service levels and increase transparency. Implemented tools for simplified FOIA, regulatory, and City Council reporting.
Go Live Checklist	Provided Go Live Checklists specific to the City’s implementation based on project scope, process, and setup decisions. Checklist included critical items for completion and validation in preparation of Go Live.



Services Type	Services Description																																
City of Joliet– (continued)																																	
Conversion Strategic Plan & Data Clean-up	<p>Developed a strategic plan for identification, clean up, and conversion of data. Coordinated with multiple departments to <b>locate relevant data</b> sources, identify specific department data needs, and develop strategy to accommodate departments and City-wide need for <b>centralized and consistent data</b>. <b>Facilitated standardization of data entry and maintenance</b> as well as project plan and timeline for clean-up actions to prepare the data for conversion.</p> <ul style="list-style-type: none"> <li>• Property File Strategic Plan Development/Data Clean-up</li> <li>• Customer File Strategic Plan Development/Data Clean-up &amp; Maintenance (including use of customer merge tool)</li> </ul>																																
Project Management	<p>Project Management of the <b>Tyler Munis</b> ERP system</p> <table border="0"> <tbody> <tr> <td>❖ Chart of Accounts</td><td>❖ Tyler Forms</td></tr> <tr> <td>❖ General Ledger</td><td>❖ Central Property</td></tr> <tr> <td>❖ Budget</td><td>❖ Permitting</td></tr> <tr> <td>❖ Accounts Payable</td><td>❖ Inspections</td></tr> <tr> <td>❖ Purchasing</td><td>❖ Planning/Zoning</td></tr> <tr> <td>❖ Contract Management</td><td>❖ Code Enforcement</td></tr> <tr> <td>❖ Accounts Receivable</td><td>❖ Business Licenses</td></tr> <tr> <td>❖ General Billing</td><td>❖ Bond &amp; Escrow Tracking</td></tr> <tr> <td>❖ Project Tracking</td><td>❖ Contractor Tracking</td></tr> <tr> <td>❖ Grant Management</td><td>❖ Utility Accounts</td></tr> <tr> <td>❖ False Alarm Billing</td><td>❖ Utility Services</td></tr> <tr> <td>❖ Fixed Assets</td><td>❖ Meter Inventory</td></tr> <tr> <td>❖ Tyler Cashiering</td><td>❖ Meter reading</td></tr> <tr> <td>❖ Tyler Content Manager</td><td>❖ Utility Billing</td></tr> <tr> <td></td><td>❖ Utility Service Orders</td></tr> <tr> <td></td><td>❖ Utility Assessments</td></tr> </tbody> </table>	❖ Chart of Accounts	❖ Tyler Forms	❖ General Ledger	❖ Central Property	❖ Budget	❖ Permitting	❖ Accounts Payable	❖ Inspections	❖ Purchasing	❖ Planning/Zoning	❖ Contract Management	❖ Code Enforcement	❖ Accounts Receivable	❖ Business Licenses	❖ General Billing	❖ Bond & Escrow Tracking	❖ Project Tracking	❖ Contractor Tracking	❖ Grant Management	❖ Utility Accounts	❖ False Alarm Billing	❖ Utility Services	❖ Fixed Assets	❖ Meter Inventory	❖ Tyler Cashiering	❖ Meter reading	❖ Tyler Content Manager	❖ Utility Billing		❖ Utility Service Orders		❖ Utility Assessments
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Services Type	Services Description
City of Joliet– (continued)	
Implementation Support	<p>Community Development System Setup Design &amp; Strategy including gathering the specific reporting and processing needs for the departments utilizing the system and development of a configuration design to take advantage of available <b>Tyler Munis</b> ERP functionality and department requirements.</p> <ul style="list-style-type: none"> <li>• Permit Applications and Issuance</li> <li>• Inspections</li> <li>• Planning &amp; Zoning Applications and tracking</li> <li>• Engineering Applications and tracking</li> <li>• Contractor Tracking</li> <li>• Bond &amp; Escrow Tracking</li> <li>• Zoning Code Enforcement</li> <li>• Code Enforcement</li> </ul>
	<p>License System Setup Design &amp; Strategy including development of a configuration design and strategy that accommodated the different renewal periods, license types, and license formats</p> <ul style="list-style-type: none"> <li>• Business Account Setup &amp; Maintenance</li> <li>• Business License Applications</li> <li>• Business License Renewals</li> <li>• Liquor License Applications</li> <li>• Liquor License Renewals</li> </ul>

Services Type	Services Description
City of Joliet– (continued)	
Process and Strategy Consulting	<p>Process improvement consulting to assist with setting direction for the implementation of the new <b>Tyler Munis ERP</b> functionality</p> <ul style="list-style-type: none"> <li>• ERP System Security</li> <li>• Cash Management</li> <li>• Accounts Payable</li> <li>• Purchasing</li> <li>• Grant Management</li> <li>• Cashiering</li> <li>• Business Licensing</li> <li>• Inspection scheduling &amp; completion</li> <li>• Planning &amp; Zoning Applications</li> <li>• Zoning Code Enforcement</li> <li>• Contractor Tracking</li> <li>• Budget Creation &amp; Adoption</li> <li>• Miscellaneous Billing</li> <li>• Accounts Receivable</li> <li>• Project Accounting</li> <li>• Fixed Assets</li> <li>• Utility Billing</li> <li>• Permit Applications &amp; Issuance</li> <li>• Engineering Applications &amp; Tracking</li> <li>• Code Enforcement</li> <li>• Bond &amp; Escrow Tracking</li> </ul>
Desktop Procedures	<p>Development of desktop procedures tailored to the City's specific processes, policies, and <b>Tyler Munis</b> configuration.</p> <ul style="list-style-type: none"> <li>• Accounts Payable</li> <li>• Purchasing and Requisitions</li> <li>• Cashiering/Payment Entry</li> <li>• Budget Creation and Adoption</li> <li>• Alarm Billing</li> <li>• Customer Central</li> <li>• Vendor Central</li> <li>• Invoice Central</li> </ul>

Services Type	Services Description																						
City of Joliet– (continued)																							
Training Workshops	<p>Developed the training plan and schedule, provided hands-on end-user training sessions and workshops for City personnel <b>tailored to the City specific processes, policies and procedures</b>. Training focused on supporting personnel to learn and understand the process as well as become comfortable using the new system.</p> <ul style="list-style-type: none"> <li>• Accounts Payable</li> <li>• Purchasing and Requisitions</li> <li>• Cashiering/Payment Entry</li> <li>• Budget Creation and Adoption</li> <li>• Alarm Billing</li> <li>• Dashboard, Inquiry and Reporting</li> </ul>																						
Post Live Review	<p>Conducted post live review session with Village personnel to capture any open issues, assess implementation outcomes met Village goals, and develop an action plan to close open issues or implement any outstanding functionality. Conducted analysis and provided report on project implementation outcomes.</p> <table border="0"> <tbody> <tr> <td>❖ Chart of Accounts</td><td>❖ Tyler Content Manager</td></tr> <tr> <td>❖ General Ledger</td><td>❖ Tyler Forms</td></tr> <tr> <td>❖ Budget</td><td>❖ Central Property</td></tr> <tr> <td>❖ Accounts Payable</td><td>❖ Permitting</td></tr> <tr> <td>❖ Purchasing</td><td>❖ Inspections</td></tr> <tr> <td>❖ Contract Management</td><td>❖ Planning/Zoning</td></tr> <tr> <td>❖ Accounts Receivable</td><td>❖ Code Enforcement</td></tr> <tr> <td>❖ General Billing</td><td>❖ Business Licenses</td></tr> <tr> <td>❖ False Alarm Billing</td><td>❖ Escrow Tracking</td></tr> <tr> <td>❖ Fixed Assets</td><td>❖ Contractor Tracking</td></tr> <tr> <td>❖ Tyler Cashiering</td><td></td></tr> </tbody> </table>	❖ Chart of Accounts	❖ Tyler Content Manager	❖ General Ledger	❖ Tyler Forms	❖ Budget	❖ Central Property	❖ Accounts Payable	❖ Permitting	❖ Purchasing	❖ Inspections	❖ Contract Management	❖ Planning/Zoning	❖ Accounts Receivable	❖ Code Enforcement	❖ General Billing	❖ Business Licenses	❖ False Alarm Billing	❖ Escrow Tracking	❖ Fixed Assets	❖ Contractor Tracking	❖ Tyler Cashiering	
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Services Type	Services Description
Village of Schaumburg – March 2010 – March 2013	
Village Background	<p>Products Selected: <b>Tyler Munis</b></p> <p>No dedicated implementation staff</p> <p>Small project implementation team</p> <p>IT Support in-house</p> <p>SaaS Implementation ERP</p> <p>Budget: \$181,214,987</p> <p>Population: 74,872</p>
Contacts	<p>Peter Schaak, Director of Information Technology (847) 923-3825</p> <p>Sam Ferguson, Director of Information Technology, <i>Retired</i> (847) 732-1558</p>
System Selection	<b>Tyler Munis</b> ERP RFP and Selection
Contract Negotiations	<b>Tyler Munis</b> ERP
Project Management	<p>Project Management <b>Tyler Munis</b> ERP Implementation. Complete implementation within 18 months.</p> <ul style="list-style-type: none"> <li>❖ Chart of Accounts</li> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Cash Management</li> <li>❖ Fixed Assets</li> <li>❖ Project Accounting</li> <li>❖ Grant Management</li> <li>❖ Accounts Payable</li> <li>❖ Purchasing</li> <li>❖ Contract Management</li> <li>❖ Miscellaneous Billing</li> <li>❖ Alarm Billing &amp; Incident Mgmt.</li> <li>❖ Utility Services</li> <li>❖ Meter Inventory</li> <li>❖ Utility Service Orders</li> <li>❖ Personnel Management</li> <li>❖ Payroll Processing</li> <li>❖ Benefit Management</li> <li>❖ Time Entry</li> <li>❖ Accrual Tracking</li> <li>❖ Licensing</li> <li>❖ Permits and Inspections</li> <li>❖ Planning/Zoning Petitions</li> <li>❖ Property Management</li> <li>❖ Code Enforcement</li> </ul>

Services Type	Services Description
Village of Schaumburg – (continued)	
Go Live Checklist	<p>Development of Go Live checklists based on the Village’s implementation scope, process, and setup decisions. Checklists included critical items for completion and validation in preparation of Go Live</p> <ul style="list-style-type: none"> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Cash Management</li> <li>❖ Fixed Assets</li> <li>❖ Project Accounting</li> <li>❖ Grant Management</li> <li>❖ Accounts Payable</li> <li>❖ Purchasing</li> <li>❖ Contract Management</li> <li>❖ Miscellaneous Billing</li> <li>❖ Utility Services</li> <li>❖ Utility Service Orders</li> <li>❖ Personnel Management</li> <li>❖ Payroll Processing</li> <li>❖ Benefit Management</li> <li>❖ Licensing</li> <li>❖ Permits and Inspections</li> <li>❖ Planning/Zoning Petitions</li> <li>❖ Property Management</li> <li>❖ Code Enforcement</li> </ul>
Post Live Review	<p>Conducted post live review session with Village personnel to capture any open issues, assess implementation outcomes met Village goals, and <b>develop an action plan</b> to close open issues or implement any outstanding functionality. Conducted analysis and provided report on project implementation outcomes.</p> <ul style="list-style-type: none"> <li>❖ General Ledger</li> <li>❖ Budget</li> <li>❖ Cash Management</li> <li>❖ Fixed Assets</li> <li>❖ Project Accounting</li> <li>❖ Grant Management</li> <li>❖ Accounts Payable</li> <li>❖ Purchasing</li> <li>❖ Contract Management</li> <li>❖ Miscellaneous Billing</li> <li>❖ Utility Services</li> <li>❖ Utility Service Orders</li> <li>❖ Personnel Management</li> <li>❖ Payroll Processing</li> <li>❖ Benefit Management</li> <li>❖ Licensing</li> <li>❖ Permits and Inspections</li> <li>❖ Planning/Zoning Petitions</li> <li>❖ Property Management</li> <li>❖ Code Enforcement</li> </ul>