

GENERAL APPLICATION CAPABILITIES

No.	Category	Description of Capability	Included Yes/No	If answered "YES", detail on how this will be accomplished. "REQUIRED"
1	Dashboard	<p>Enable configuration of a detailed participant screen for displaying a contractor's personal information with date/time stamp:</p> <ul style="list-style-type: none"> a. Contractor's Name/Business Name b. Contractor's Type of License c. License Number (s) and Expiration Date d. Authorized user (s) e. Bond Status f. Business License and Status g. Addresses/Business and mailing address h. Cell/Landline Numbers/Fax/Email Authorized User (s) 		
2	Search Forward Capabilities	<p>Enable searches of names that sound alike and numerically rank results of master name index search by increasing likelihood of valid identification.</p>		
3	Search	<p>Configure searches appropriate to Case type, Permit Type</p>		
4	View	<p>Provide ability for electronic plans mark-up and tracking of revisions</p>		
5	View	<p>Configure data entry and update screens</p>		
6	Alerts	<p>Validate alerts based on address; zoning; licensing.</p>		
7	Dashboards	<p>Provide a set of dashboard items that can be selected by individual users, according to their role in the organization</p>		

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8	Audit Trail	Enable configuring the system to log any or all users activity, including the username, date, time, workstation address and details of all data/events/files viewed, added, edited, and deleted by each user, and to display all user account logs.		
9	Alerts	Provide ability to automatically notify customer of approval or rejection		
10	Alerts	Provide ability to automatically notify user of new data in queue.		
11	Alerts	Provide various types of notification (i.e. expired permits, rejected inspection; final inspections, dormant account, trust accounts, etc.,)		
12	User Groups	Provide secure, web and app login account for all users with only access to data established with login		
13	User Groups	Allow multiple user groups access simultaneously.		
14	User Groups	Enable configuring user group roles with permissions to view, add, edit and /or delete pre-determined access.		
15	Data Fields	Enable configuring each data field with the following, which may vary by use and/or permit type: a. Screen label b. Mouse-over text tip c. Security level d. Default value		

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16	Data Fields	<p>Enable configuring of the system by adding new data fields to any table without corrupting pre-existing records:</p> <ul style="list-style-type: none"> a. Values for data fields b. Free text fields c. Formatted data fields d. Calculated fields 		
17	Code Tables	<p>Enable configuration of any code table records with an effective date range. Enable the system to determine which table record applies by comparing the effective date range to a designated data-element, system date, or calculated date.</p>		
18	Code Tables	<p>Display only relevant/available code table values on data entry screens.</p>		
19	Rule Engine	<p>Configure an unlimited number of workflow rules through a graphical or tabular interface. Each rule includes:</p> <ul style="list-style-type: none"> a. Trigger b. Response c. Optional prompt (the prompt provides opportunity to complete or cancel the 		

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20	Rules Engine	<p>Set up the following configurable rule triggers, which may be limited to or vary by case-type:</p> <ul style="list-style-type: none"> a. Upon entering a specified event-type in a record. b. Upon entering a specified document-type in a record. c. Specified elapsed time following entry of a specified event-type or document-type, unless another specified event-type or document-type was subsequently entered. d. Specified amount or greater amount on account receivable remaining due for a specified elapse time or on a specified date. e. Upon completion of another specified rule. f. Upon attempting to enter data without first completing another data field or mandatory field. g. Upon attempting to enter data in an incorrect format or invalid value (data validation). 		
21	Rules Engine	<p>Set up the following actions to occur in response to a triggering event:</p> <ul style="list-style-type: none"> a. Add a fee to a customer's account under a specified condition (e.g. add late fee when payment overdue) b. Complaint/Court Cases c. Add a document to a complaint/Court Case d. Add data to a complaint/court case. e. Change the status of a court case. 		

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21	Rules Engine Continued	<ul style="list-style-type: none"> f. Send a document to a specified printer. g. Alert a user or group of users with a screen message or email h. Require another user to provide approval for completing a transaction. (e.g. supervisor requested to approve) i. Disable a user account (e.g., when user's employment status changes from ("Active"). 		
22	Database Structure	Allow re-creation of statistical financial information for any point in time through all database elements being date and time stamped and the user that entered the data identified.		
23	Security	<p>Enable configuring a security level for the following:</p> <ul style="list-style-type: none"> a. User group b. Land Use and/or Permit Type c. Document type d. Event type e. Data field f. Query/report g. Form letter/notice/order h. Calendar i. User screen 		
24	Security	Prevent each user from accessing records and performing actions, unless the user has a security level at least equal to the security level for the record or action.		
25	Reporting	Provide a user-friendly, ad-hoc query function that any approved user can utilize without having to know a programming language.		

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26	Reporting	Permit approved users to create queries based on any field(s) and provide a method for saving detailed queries for later execution.		
27	Reporting	Provide the ability to generate reports automatically or otherwise on a predefined schedule. Reports would be auto-generated upon a date trigger and auto-archived for later review.		
28	Measurement	Provide the ability to measure and verify construction plans to "architect's scale"		
29	Measurement	Provide the ability to measure electronically and verify site plans to "engineer's scale".		
30	Electronic Signatures	Provide for capture and application of live electronic signatures and incorporate digital signatures/certificates. stamps/seals		
31	Electronic Signatures	Provide the ability to sign multiple documents in queue through a single action.		
32	Automatic Messaging	Generate and send automated email messages		
33	Automatic Messaging	Support intergration with Shelby County Active Direcotry to generate and send automated email messages		
34	Public Portal	Provide a public portal and app that allows the general public to access information and documents. Permits, Complaints and Land Use.		
35	Workflow	Provide a workflow to accept an application and/or permit and automatically route tasks through a predetermined matrix that includes required/requested documents.		

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36	Workflow	Provide a workflow that attach additional documents at a later date to an original application or permit submittal.		

OPD - Land Use Application-Filing

37	E-Filing	Provide a facility for customers to submit applications and supporting documents electronically. Allow the planner to accept or reject each filing and automatically enter the filing information into the Land/Use permitting system for processing		
38	Reporting Compliance	Collect and maintain information necessary to comply with reporting of applications and filings recording to the Unified Development Code.		
39	Application	Assign the application to a planner according to OPD procedures and rules. Allow for manual overrides.		
40	Application	Landmark cases to be entered and mapped		
41	Application Routing	Provide mechanism to send a customer schedule dates for meetings upon successful submittal of a land use application.		
42	Automatic Messaging	Upon approval of a land-use application, provide notification to the applicant for next steps to be tracked and submitted		
43	Application Initiation	Initiate a submittal for zoning changes		

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44	Application Initiation	Initiate a submittal for Land Use Control Board (LUCB)		
45	Application Initiation	Initiate a submittal for Planned Development (PD)		
46	Application Initiation	Initiate a submittal for Special Use Permits (SUP)		
47	Application Initiation	Allow editing the application type without deleting or re-entering a case. If the new application type has additional required fields, the user must complete those fields upon changing the case-type. System stores the original and current application types and date of change.		
48	Application Initiation	Provide the ability to print a label		
49	Approvals	Allowing approvals to be assigned to groups embedded in workflows.		
50	Payment Options	Provide ability to make online payments.		
51	Application Packet	Provide a on-line video for first time filers to complete a application.		
52	Payment Options	Provide a workflow for processing a payment In-house (Customer Present).		
53	Payment Options	Provide a workflow for processing a payment on-line.		

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54	Reporting	Provide a user friendly ad hoc query function that any user can utilize without having to know a programming language.		
55	Reporting	Permit users to create queries based on any data field and provide a method for saving detailed queries for later execution.		
56	Reporting	Provide the ability to generate reports automatically or otherwise on a predefined schedule. Reports would be auto-generated upon a date trigger and auto-achieved for later review.		
57	Reporting	Provide a report of dormant trust and bond accounts.		
58	Cashiering	Provide a dashboard displaying items (i.e. assigned tasks, emails alerts, etc.)		

Technical

59	Technical	<p>The proposed solution must meet benchmarks established for user testing and acceptance phase. These benchmarks will include items such as:</p> <ul style="list-style-type: none"> ● The number and types of defects that will be allowed for production. ● Response time with a load of 200 concurrent users. ● Access time for user in production environment. 		
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No.	Category	Description of Capability	Included Yes/No	If answered "YES", detail on how this will be accomplished. "REQUIRED"
60	Technical	<p>The proposed solution must provide a system-wide audit trail and must log the creation, modification and deletion records to include, at a minimum, the following:</p> <ul style="list-style-type: none"> • User ID • Station ID • Time Stamp 		
61	Technical	The proposed solution needs to be PCI Compliant if going to generate Credit Card data.		
62	Technical	The proposed solution must provide the ability to add customized reports to be run at the user level.		
63	Technical	<p>ESB, Enterprise Service Bus</p> <p>The proposed solution does support data exchange standards such as the National Information Exchange Model (NIEM) and a Service Oriented Architecture conforming to the Global Reference Architecture (GRA). The vendor should list all current NIEM compliant data exchanges and any in development.</p>		
64	Technical	The proposed solution must provide a development environment including the ability for testing and configuring changes for the production database. The proposed solution must allow both production and development database to be accessed simultaneously without cross linking or cross contamination.		

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65	Technical	The proposed solution must include spelling and grammar check.		
66	Technical	The proposed solution must include a tiered level of technical support up to and including 24x7x365.		
67	Technical	The successful vendor must provide a data dictionary, ER diagrams and user manuals for the system. The vendor must provide updated documents with each release/update.		
68	Technical	The proposed solution must auto fill date/time entry fields but allow for manual date change.		
69	Technical	The proposed solution must have the ability to display a calendar to select from to populate the date fields.		
70	Technical	The proposed solution must provide an outline help option based on process and should be context sensitive. This help function must be integrated and include screenshots.		
71	Technical	<p>The proposed Land-Use and Permitting System must be easily managed through graphical user interfaces. The system must allow for secure remote administration as well as onsite administration. The administration functions include at a minimum:</p> <ul style="list-style-type: none"> ● User account and password management ● Workflow Configuration ● System security management ● System log review and maintenance 		

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71	Technical Continued	<ul style="list-style-type: none"> ● System reports ● Notification management ● Software threshold parameter management ● System and database backup initiation <p>The system must maintain a historical record of all changes made to the system's components. It must ensure that system error and events for software, hardware, interfaces, operating system, and network are written to a system event log accessible and searchable by a system administrator. The system administrator must be able to easily monitor the system status directly or remotely.</p> <p>The system must have a backup system that allows backup of the system and databases without interfering with Land-Use Permitting Systems operations, as well as restoration of the system and databases in the event of system or database failure.</p>		
72	Technical	The proposed solution must support an interface to be OnBase document management solution that allows related document to be stored or viewed based on a specific case number.		
73	Technical	Data must be converted from legacy systems Permit Plus and allow importing/storing/searching on all data from the previous "Permits Plus" system.		
74	Technical	The proposed solution shall specify any additional software, licensing or modifications needed.		
75	Technical	The proposed solution must include read only functionality from a web browser to allow the public to do research on historical permit documentation		

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76	Technical	The proposed solution shall include all necessary server hardware and system software as a separate cost. Shelby County reserves the right to purchase hardware from the proposer or purchase comparable hardware from another source.		
77	Technical	Provides a consumable web service from multiple ESRI GIS sources.		
78	Technical	Land-Use and Permitting System synchronize data between GIS and Permitting Software with case number, type, location detail.		
79	Technical	<p>The proposed solution must include training for all staff members and train the trainer sessions, coinciding with:</p> <ul style="list-style-type: none"> 1 Pre-implementation 2 During implementation phases 3 Post-implementation <p>The vendor can propose web based training delivery option to include onsite interactive sessions and recorded sessions to be replayed later by the end users.</p>		
80	Technical	<p>QUESTIONS:</p> <p>Do you provide "Best Practice" Financial Reports? Please provide examples of these reports.</p> <p>Do you provide "Best Practice" Productivity Reports? Please provide examples of these reports.</p> <p>Does the permitting system require to be vendor hosted?</p>		

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80	Technical Questions Continued	<p>What are the fees associated for hosting?</p> <p>What are the levels of support for vendor hosting?</p> <p>What are the hosted vendors frequency for version updates?</p> <p>Does the permitting system allow to be client hosted?</p> <p>What are the fee associated for client hosting?</p> <p>What are the levels of support for client hosted?</p> <p>What are the recommended frequency for client hosted updates?</p> <p>What are the functionality exchange options?</p> <p>Does the permitting system support Web Service?</p> <p>Does the permitting system support Map Services?</p> <p>Does the permitting system support text messaging?</p> <p>Does the permitting system support Batch Processing?</p> <p>Does the permitting system support API?</p> <p>Does the permitting system support FTP?</p> <p>Does the permitting system support Java File Listeners?</p> <p>Does the permitting system support ESB Exchange?</p> <p>Does the permitting system support MULE Exchange?</p> <p>Does the permitting software support Downloads and Uploads like?</p> <p>*PDF</p> <p>*CVS</p> <p>*XLS</p>		

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80	Technical Questions Continued	*DOC *Flat file * Comma Delimited * Quote Delimited		
81	Technical	Ability to support Application server such as IIS or Java EE Environments like Glassfish preferred		
82	Technical	Ability to support MS SQL 2005 or newer compliant relational database		
83	Technical	Ability to support a data tier that includes transaction-level backup and restoration (should not interfere with ongoing operations)		
84	Technical	Ability for tiers to run on separate servers.		
85	Technical	Ability to provide a non-production training environment including the ability to periodically copy the production database to the training database. The proposed solution must allow both production and training databases to be accessed simultaneously without cross linking or cross contamination.		
86	Technical	Ability to be installed alongside other applications.		

Technical Web Requirements

87	Technical	Ability to support network level access controls (implies that services shall only be visible on pre-configured ports.		
88	Technical	Ability to support certificate management infrastructure.		

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89	Technical Continued	Provide interoperability with we services/SPI's implemented using products from other suppliers.		
90	Technical	Provide role based authorization defined by application; role based authorization can use multiple directories, preferably LDAP.		
91	Technical	Ability to allow users to belong to multiple roles.		
92	Technical	Provide support for Multiple Instances.		
93	Technical	Provide support for portlets.		
94	Technical	Ability to expose a web service as a portlet		
95	Technical	Ability of the system to monitor its own health.		
96	Technical	Ability to send alerts based on the non-receipts of files or messages		
97	Technical	Ability to send alerts to notify team members of failed processes.		

Technical - Auditing

98	Technical	Provide support for Audit logging		
99	Technical	Ability to provide a system-wide audit trail that must log the creation, modification and deletion of records to include, at a minimum, the following: user ID, Station ID, Time stamp.		
100	Technical	Ability to control audit levels.		
101	Technical	Ability to direct audit logs to database, files, etc.		
102	Technical	Ability to manage audit log growth.		

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Technical - Data and Security

103	Technical Continued	Provide SSL encrypted authentication		
104	Technical	Instructions: For the following technical requirements, please respond to the request.		
105	Technical	Specify memory requirements for virtual or physical server deployment.		
106	Technical	Specify bandwidth application required in communication between server and client.		
107	Technical	Specify number of servers required and server operating system version (prefer Windows Server 2008).		
108	Technical	Specify who is responsible for application administration.		
109	Technical	Specify if session sharing between multiple instances allowed.		
110	Technical	Specify if proposed solution allows flexibility as to when updates/changes and backups are made to the system.		
111	Technical	The proposed solution shall specify any additional software, licensing or modifications needed.		
112	Technical	Specify how maintenance/load of service packs and technical upgrades/new releases will be handled.		
113	Technical	Specify if there are additional fees for retrieving data that resides in the cloud in a specified format.		
114	Technical	Specify details on all levels of security. Include physical security, transmissions security, storage security, data and access security, and application security.		

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115	Technical Continued	Does proposed solution require installation of any software. If yes, explain.		
116	Technical	Does the Land Use/Permitting System support smart forms.		

Plans Review

117	Plans Review	Provide a workflow to accept an application and/or permit and automatically route tasks thru a predetermined matrix that includes required/requested documents.		
118	Plans Review	Provide an option to attachment of additional documents at a later date to an original application or permit submitted.		
119	Plans Review	Provide ability to measure and verify electronically submitted building plans "to architect scale".		
120	Plans Review	Provide ability for customer to submit building application and supporting documents on-line.		
121	Plans Review	Provide multiple payment options: on-line, credit card, check, cash.		
122	Plans Review	Provide ability to review plans from multiple users simultaneously.		
123	Plans Review	Provide on-line submittal and professing and/or approval of certificate of occupancy.		

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124	Plans Review	Provide a on-line video for first-time filers of the procedures to complete an application.		
125	Plans Review	Provide a dashboard displaying times (e.g. assigned tasks, approvals, emails, time alerts, performance metrics and calendars,) that can be selected by individual users, according to authority level.		
126	Licensing	Provide a web solution for the tracking of contractor license online.		
127	Licensing	Provide online workflow for new license applicants.		
128	Licensing	Provide online Contractor license renewals.		
129	Licensing	Provide ability for contractor to have access to secure logins for approval and/or removal of employees.		
130	Licensing	Provide ability to auto fill data fields of a contractor with multiple licenses (e.g. address, phone number, etc.,)		
131	Renewals	Provide ability for annual renewal of trade licenses online.		
132	Renewals	Provide online renewal of annual sign permits.		
133	Renewals	Provide online renewal of annual elevator operating certificates.		
134	Inspector	Provide a secure web and app login account for Inspectors with only access to data associated with Inspector area.		

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135	Inspector	Provide a dashboard displaying items (e.g. assigned tasks, approvals, emails, alerts, Inspector calendars, performance metric) that can be selected by individual users, based on position status.		
136	Inspector	Provide ability to have access to all documents associated with permit.		
137	Inspector	Provide separate inspector calendar with the ability to view past, present and future scheduled inspections.		
138	Inspector	Provide ability for inspector to launch GIS (e.g. location).		
139	Inspector	Provide ability to manage workload by permit type and Inspector area.		
140	Accounting Configuration	Enable configuring accounts and automating receipt allocation.		
141	Accounting Configuration	Enable configuring any number of surcharges and assessments by specifying an amount and an effective data range.		
142	Accounting Configuration	Enable configuring rules for calculating fees, assessments, and fines based upon a total payment.		
143	Accounting Configuration	Allow a user to set post periods for each fiscal year.		
144	Accounting	Provide dual-entry accounting for financial record keeping.		
145	Accounting	Enable configuring an unlimited number of types of revenue,		

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146	Accounting	Allow transmitting and accepting electronic financial transactions (credit/debit cards, account transfers) in accordance with PCI standards.		
147	Accounting Bond Trust	Provide bond trust accounting including: <ul style="list-style-type: none"> • Tracking who is the payee. • Cash bond refunds. 		
148	Accounting	Provide ability for management to approve checks.		
149	Accounting	Provide ability for management of approve voids.		
150	Accounting	Void receipts, make necessary adjustments to accounts, and note reasons for void.		
151	Accounting	Provide the ability to post fund received in payment		
152	Accounting	Provide the ability to update records.		
153	Accounting	Provide the option to create a separate receipt for each case if funds are to be applied to multiple cases.		
154	Accounting	Provide the option to verify receipt information prior to printing		

No.	Category	Description of Capability	Included Yes/No	If answered "YES", detail on how this will be accomplished. "REQUIRED"
155	Accounting	Process over-payment and under-payment transactions.		
156	Accounting	Process over-rings, voids, overages, and shortages.		
157	Accounting	Receive payments in multiple forms, including debit or credit card (in person, online) check, money order, cash.		
158	Accounting	Accept payments without a association when appropriate (e.g. photo copying fee, record search fee).		
159	Accounting	Record fee waivers in lieu of paying a required fee.		
160	Accounting	Reconcile cash amounts by single cashier and multiple cashiers		
161	Accounting	Process a partial or complete refund and provide a receipt reflecting the refund.		
162	Accounting	Reprint a receipt.		
163	Accounting	Provide ability to reconcile various accounts (i.e. trust accounts, demo accounts, return checks)		
164	Accounting	Provide copies of all standard system reports along with a description for their use.		
165	IVR	<p>Does the Land-Use/Permitting System interface with AVAYA telephone interactive voice response (IVR) system for the following:</p> <ul style="list-style-type: none"> a. Inspection Scheduling b. Inspection Results c. Automated Phone Companies (i.e. sign renewal; license renewal; elevator renewal) d. Public Notices (i.e. fee change, office work hours) e. Polling results (surveys) 		

