

***RESPONSE PACKET***  
***SP-19-0104***

# RESPONSE SIGNATURE PAGE

Type or Print the following information.

PROSPECTIVE CONTRACTOR'S INFORMATION					
Company:	MTX Group, Inc				
Address:	3001 Dallas Parkway, Suite 210				
City:	Frisco	State:	TX	Zip Code:	75034
Business Designation:	<input type="checkbox"/> Individual <input type="checkbox"/> Partnership	<input type="checkbox"/> Sole Proprietorship <input checked="" type="checkbox"/> Corporation	<input type="checkbox"/> Public Service Corp <input type="checkbox"/> Nonprofit		
Minority and Women-Owned Designation*:	<input type="checkbox"/> Not Applicable <input type="checkbox"/> African American	<input type="checkbox"/> American Indian <input type="checkbox"/> Hispanic American	<input type="checkbox"/> Asian American <input type="checkbox"/> Pacific Islander American	<input type="checkbox"/> Service Disabled Veteran <input type="checkbox"/> Women-Owned	
	AR Certification #: _____		* See <i>Minority and Women-Owned Business Policy</i>		

PROSPECTIVE CONTRACTOR CONTACT INFORMATION			
<i>Provide contact information to be used for bid solicitation related matters.</i>			
Contact Person:	Shona Huffman	Title:	Government Relations Manager
Phone:	469-789-6860	Alternate Phone:	
Email:	shona.huffman@mtxb2b.com		

CONFIRMATION OF REDACTED COPY
<input type="checkbox"/> YES, a redacted copy of submission documents is enclosed. <input checked="" type="checkbox"/> NO, a redacted copy of submission documents is <u>not</u> enclosed. I understand a full copy of non-redacted submission documents will be released if requested.  <i>Note: If a redacted copy of the submission documents is not provided with Prospective Contractor's response packet, and neither box is checked, a copy of the non-redacted documents, with the exception of financial data (other than pricing), will be released in response to any request made under the Arkansas Freedom of Information Act (FOIA). See Bid Solicitation for additional information.</i>
ILLEGAL IMMIGRANT CONFIRMATION
By signing and submitting a response to this <i>Bid Solicitation</i> , a Prospective Contractor agrees and certifies that they do not employ or contract with illegal immigrants. If selected, the Prospective Contractor certifies that they will not employ or contract with illegal immigrants during the aggregate term of a contract.
ISRAEL BOYCOTT RESTRICTION CONFIRMATION
By checking the box below, a Prospective Contractor agrees and certifies that they do not boycott Israel, and if selected, will not boycott Israel during the aggregate term of the contract.  <input checked="" type="checkbox"/> Prospective Contractor does not and will not boycott Israel.

**An official authorized to bind the Prospective Contractor to a resultant contract shall sign below.**

The signature below signifies agreement that any exception that conflicts with a Requirement of this *Bid Solicitation* will cause the Prospective Contractor's response to be rejected.

**Authorized Signature:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Printed/Typed Name:** Jeff Gautsche \_\_\_\_\_ **Date:** \_\_\_\_\_

## RESPONSE CHECKLIST

Completed and Signed Response Signature Page	<input type="checkbox"/> No
EO 98-04	<input type="checkbox"/> No
Equal Opportunity Policy	<input type="checkbox"/> No
Proposed Subcontractors Form	<input type="checkbox"/> No
VPAT	<input type="checkbox"/> No
Information for Evaluation Section	<input type="checkbox"/> No

## **INFORMATION FOR EVALUATION**

- *Provide a response to each of the items/questions in this section. Prospective Contractor may expand the space under each item/question to provide a complete response.*
- **Do not** include additional information if not pertinent to the itemized request.

### **E.1 Experience (5 Points)**

1. The Prospective Contractor should describe its corporate background to provide context of the organization that will be providing the services in this RFQ. The response should provide a brief overview of the firm's history, philosophy, and credentials in providing the services requested in the RFQ.

MTX B2B Solutions LLC was founded in Albany County, New York in 2008. As MTX expanded with successful projects it evolved into MTX Group, Inc. While maintaining its strong presence and repeat clients in New York, in 2019, MTX opened its new headquarters in Frisco, Texas.

MTX innovates and migrates Salesforce-based solutions for its customers—specifically enterprise cloud computing and services. As part of our culture and the way we do business, our focus is on satisfying the needs of our clients. We have provided consultation, development, and implementation of cloud-based solutions to local, state, and federal government organizations.

MTX experts consist of over 200 people across offices in Frisco, Texas; Albany, New York; Boston, Massachusetts; Austin, Texas; Santa Monica, California; Jaipur, India; and Hyderabad, India. MTX has performed projects and services, with a 100% success rate, in the government, banking, insurance, and healthcare industries.

MTX offers custom-developed as well as configurations for complex-requirements using Salesforce solutions. These solutions are based on Salesforce Sales Cloud, Service Cloud, Marketing Cloud, Customer Communities, and Integration Cloud.

We commit to 100% client success:

- Relentless focus on quality and service and the understanding that our client's challenges are business and process challenges—not just technical challenges.
- Salesforce administration and implementation services as a trusted Silver Partner for over seven years.
- Deep knowledge and expertise of management automation tools, analytics, and business processes.
- Enterprise-level team and solutions to implement for scale and complexity.
- Dramatic shortening of time-to-value by using our hybrid, standards-based SCRUM (Agile) approach to building Salesforce solutions.
- Ability to rapidly build a reliable and scalable system; MTX brings a seasoned enterprise team to collaborate and empower.
- Extensive experience implementing, configuring, and customizing solutions on the Salesforce platform. Our 100% project success rate includes solutions such as a Customer Relationship Management System, a Case Management System, and a Licensing Management System.
- Services to assess, develop, build, and implement new applications, modernize and migrate legacy applications, develop content management systems, and integrate with GIS system.

We make our MTX Accelerators available to clients. MTX Accelerators are applications that MTX developers created. Below are three examples of MTX Accelerators.

More MTX Accelerators can be found online at: <https://www.mtxb2b.com/s/products>

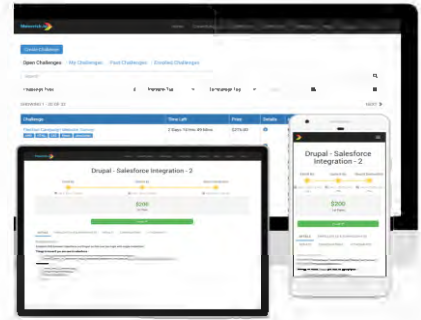
## MAVERICK.IO ARTIFICIAL INTELLIGENCE

Drive innovation with global problem-solving community powered by Artificial Intelligence API capabilities.

Maverick.io AI platform enables global enterprises to focus on solving the toughest challenges while the platform delivers key API components with specific capabilities to advance our desire to explore the unknowns.

### Benefits

- Consume enterprise APIs for powerful algorithm outcomes.
- Disrupt specific medical industry use cases.
- Disrupt specific financial industry use cases.

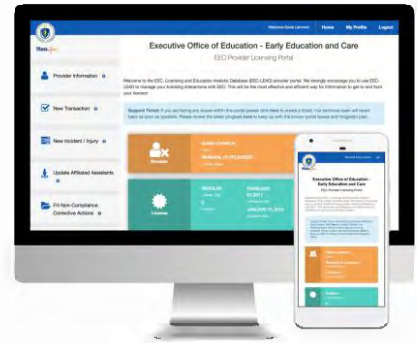


## PERMITS AND LICENSES

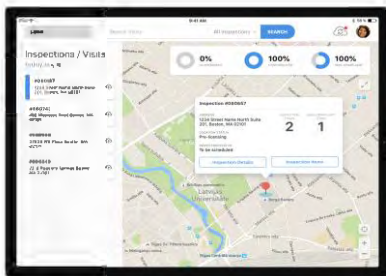
The Permits and Licenses Application has been fully developed on Salesforce's powerful Force.com platform. It enables flexibility and scalability at the highest level possible. The app is designed to transform end-to-end permitting and licensing experience for applicants and all other parties related to the process. MTX Permits and Licenses enables full lifecycle application, processing, reviewing and granting within an intuitive online portal that is highly configurable and scalable to meet client's unique needs. Whether new or renewals, individuals or businesses, this app supports everyone.

### Benefits

- Portal Community: Both prospective and current applicants are able to centralize all required documents, review and manage current status of one or more applications.
- Flexible Applications: Multiple types of permits and licenses can be contained within the portal, and new applications can be quickly configured to meet business needs.
- Resource Library: Post and save documents relevant to specific applications and processes along with the ability to notify applicants on changes.
- Electronic Payment: Applicants can make online payments quickly and easily to expedite the entire application process.
- Electronic Signature: Enables applicants to preview their applications on-demand and sign them electronically.



## INSPECTION APPLICATION



MTX Inspection helps clients manage inspections and visits intuitively. This App makes client inspection extremely easy and supports a wide variety of client use cases.

Available for use online as well as offline (as a mobile app), users can streamline the inspection process, while enforcing workflows and data consistency. The highly intuitive system, gives all stakeholders the ability to collaborate together quickly and effectively and minimizes non value-added steps.

## Benefits

- Inspections can be dynamically assigned to one or more users, with tasks specific to their inspection
- Easily configurable reports and dashboards
- Transparent processes enabling the quick understanding of all inspections

## Key features

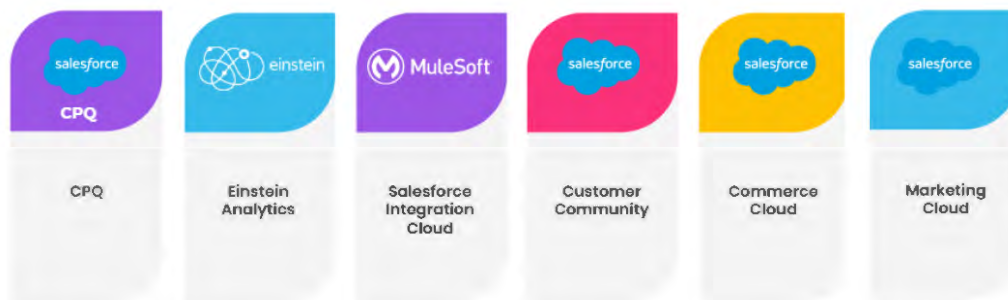
- Inspection Creation
- Flexible Intake
- Standardized processing
- Collaborative portal

## Current/Future Lines of Business & Product/Industry Focus Areas

- Salesforce Silver Partnership that will soon be a Gold Partnership.

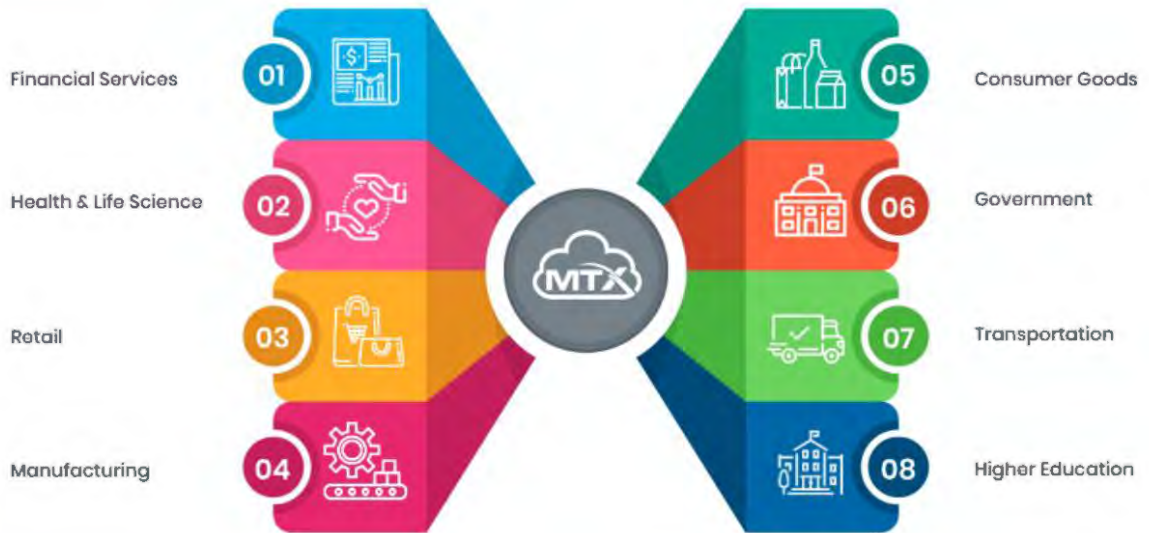


- Speciality services through partnerships, integrations, and an expanded footprint in cloud application development and services.



- Expanded commercial sector services.

## Industry Coverage



- Artificial Intelligence through our innovative crowdsourcing [Maverick.io](https://maverick.io) platform.



2. The Prospective Contractor should provide a summary of their understanding of, and interest in furnishing the services requested in the RFQ.

The requirements after reviewing the scope of the project aligns with several implementations we have completed at Nysarda and Cal Volunteers as an example. Also we are very interested in furnishing the services in RFQ as we can utilize our Accelerator “Grants & Proposals” to enable and speed up the implementation process apart from our strategic experience at various public sectors. Apart from Vendor Management and Document Management below is a summary of our understanding.





3. The Prospective Contractor should list all engagements that were completed/finished or were active in the last 5 years in the Public Sector similar to the services requested in the RFQ. Prospective Contractor may add additional rows to the Table below as needed.

REF #	ENGAGEMENT NAME	CUSTOMER NAME	CUSTOMER CONTACT	PROJECT SUMMARY
1	Salesforce Project Management	New York State Energy Research and Development Authority (NYSERDA)	<b>Contact Name:</b> Steven Lebel <b>Contact Phone:</b> 518-862-1090 <b>Email:</b> <a href="mailto:Steven.lebel@nyserda.ny.gov">Steven.lebel@nyserda.ny.gov</a>	<p>NYSERDA has 40+ programs that provide incentives to residents and businesses within NY State. However, each program has their own unique technology stack which makes maintenance difficult for any organization. NYSERDA selected 12 programs for the first 18 months to live in Salesforce with the additional programs to follow. These programs require the ability to onboard contractors and accept incentive applications with the ability to keep track of funding sources. MTX developed a wizard-based application using EdgeForm and then continued to iterate applications for other programs in a much shorter time frame. All application development is taking place within the Force.com platform while enabling community users for the contractors. Program projects data integrated with NYSERDA's contract and financial system (PeopleSoft) in bi-directional ways to sync data between these two systems. Part of the digital transformation was also the creation of a comprehensive Grants and Proposals intake and management system. In addition, all projects data from Salesforce and PeopleSoft are pushed to the enterprise data warehouse for corporate oversight reports.</p>
2	CRM and Service Cloud for Call Center	Rochester-Genesee Regional Transportation Authority	<b>Contact Name:</b> Megan Morsch <b>Contact</b>	<p>RGRTA struggled with customer's visibility and wasted hours every day by logging into multiple systems to answer simple customer questions. RGRTA wanted to bring all systems under the Salesforce service console</p>



			<p><b>Phone:</b> 585-654-0712</p> <p><b>Email:</b> <a href="mailto:mmorsch@myrts.com">mmorsch@myrts.com</a></p>	<p>so that the customer service can search and gather information efficiently and provide expedited service. The project was delivered using the SCRUM-Agile methodology. The main goal of this initiative was to improve visibility and 360-degree view of customers, connect with customers in a whole new way via SMS using Twilio and increase ridership by understanding what customers are looking for in regards to services. In addition, Salesforce platform provided greater flexibility with ad-hoc reporting and dashboard functionality that used to take significantly longer in legacy systems.</p> <p>Detailed design, development and testing were conducted with each build and release sprint. In most cases, each sprint resulted in features, functions and products that were near production ready. Later sprints in the project lifecycle focused on performance of end-to-end solution testing (functional and nonfunctional) as well as a parallel production pilot, where the RGRTA system was tested in production with a small, pilot user group. The parallel production pilot enabled the project team to verify that the RGRTA CRM produced the same results as the legacy application.</p>
3	Licensing Management System	Massachusetts Executive Office of Education (EOE): Department of Early Education and Care (EEC)	<p><b>Contact Name:</b> Sabina Ahmad</p> <p><b>Contact Phone:</b> 978-501-3311</p> <p><b>Email:</b> <a href="mailto:sahmad@doe.mass.edu">sahmad@doe.mass.edu</a></p>	<p>MTX was brought into Massachusetts to manage licensing programs for all 8,700 care providers across the state. Mass EOE went through a digital transformation for the Department of Early Education and Care where licensors manages license activities, annual visits, investigations, variance of regulations, quarterly reports and provider portal.</p> <p>MTX created a portal and management tool that allows Mass EEC to accept applications from providers and manage the licenses of providers through the Differential Licensing Cycle</p> <p>The Differential Licensing Cycle is a six-year cycle. All educators will receive annual visits and renew their license every three years as they have in the past, however the tools used to do so may differ, as explained in the following sections. The visit “type” will remain the same. Every other type of renewal could potentially be done with the Enhanced Monitoring Tool, which means the Full Review Tool will be used at least once every six years (hence the six-year cycle).</p>

**E.2 Previous Projects (5 Points)**

- The State has established mandatory qualifications that **must** be met in order to submit a response to this RFQ. To satisfy this requirement, include at least three (3) references (for the Prime Contractor) of projects that are of similar size, complexity and scope to this engagement that meets the qualifications listed in Section 2.2 of the RFQ. Prospective Contractor may copy and paste the reference table below if providing additional references.

#### Reference 1

PROSPECTIVE CONTRACTOR INFORMATION			
Name: CaliforniaVolunteers		Contact/Name: Anthony Chavez	
Project Dates: 1/2019 - Present		Contact Phone: (916) 323-7646	
CUSTOMER INFORMATION			
Customer Organization: CaliforniaVolunteers		Customer Contact Name: Anthony Chavez	
		Customer Phone:(916) 323-7646	
Customer Address: State of California CaliforniaVolunteers 1400 10th Street, 2nd Floor Sacramento, CA 95814		Customer Email: anthony.chavez@cv.ca.gov	
		Customer Fax: N/A	
PROJECT INFORMATION			
Project Objectives: The scope of work was to develop a comprehensive, personalized, and user-friendly volunteer- and service-oriented opportunity and tracking platform that is developed into a mobile application available to all Californians regardless of cellphone system and provider. This system would showcase volunteer and other service opportunities (e.g. AmeriCorps positions). Challenges the client faced: <ul style="list-style-type: none"> <li>Grants Management processes were unorganized and overly time consuming.</li> <li>AmeriCorps Programs had dozens unconnected of forms they had to fill out.</li> <li>No collaboration between AmeriCorps Program and California Volunteers Staff.</li> </ul>			
Project Description: For Customer to accomplish its goals, Provider will build a centralized Salesforce application that will handle several key initiatives which utilize Provider's AmeriCorps program, related to the Grants process. Solution proposed: <ul style="list-style-type: none"> <li>MTX's Grants &amp; Proposals Accelerator gave us an out of box way to manage complex requirement flows and document management.</li> <li>Salesforce Community Cloud allowed us to build a Portal for AmeriCorps Programs to complete information quickly and easily.</li> </ul> Benefits to Client: <ul style="list-style-type: none"> <li>Streamlined document and requirement gathering processes.</li> <li>Consolidated review and collaboration with AmeriCorps Programs.</li> <li>Saved California Volunteers staff and AmeriCorps Programs thousands of hours in routine paperwork.</li> </ul>			
PROJECT MEASUREMENTS			
Estimated Start & Completion Dates			
From:	1/2019	To:	

Actual Start & Completion Dates	From:	1/18/2019	To:	Present
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## Reference 2

PROSPECTIVE CONTRACTOR INFORMATION				
Name: Salesforce Project Management		Contact/Name: Steven Lebel		
Project Dates: State date - 1/1/2016 End date - 12/30/2017		Contact Phone: 518-862-1090		
CUSTOMER INFORMATION				
Customer Organization: New York State Energy Research and Development Authority		Customer Contact Name: Steven Lebel		
		Customer Phone: 518-862-1090		
Customer Address: 17 Columbia Circle, Albany, NY 12205		Customer Email: <a href="mailto:Steven.lebel@nyscrda.ny.gov">Steven.lebel@nyscrda.ny.gov</a>		
		Customer Fax:		
PROJECT INFORMATION				
<p>Project Objectives:</p> <p>NYSERDA has 40+ programs that provide incentives to residents and businesses within NY State. However, each program has their own unique technology stack which makes maintenance difficult for any organization. NYSERDA selected 12 programs for the first 18 months to live in Salesforce with the additional programs to follow. These programs require the ability to onboard contractors and accept incentive applications with the ability to keep track of funding sources.</p>				
<p>Project Description:</p> <p>The project was delivered using the SCRUM-Agile methodology. The main goal of this initiative was to improve visibility and 360 degree view of contractors and NYSERDA engagement while simplifying the technology stack. In addition, Salesforce platform provided greater flexibility with ad-hoc report and dashboard functionality that used to take weeks in legacy systems.</p> <p>Detailed design, development and testing were conducted with each build and release sprint. In most cases, each sprint resulted in features, functions and products that were near production ready. Later sprints in the project lifecycle focused on performance of end-to-end solution testing (functional and nonfunctional) as well as a parallel production pilot, where the NYSERDA Program portal was tested in production with a small, pilot user group. The parallel production pilot enabled the project team to verify that the NYSERDA Program Portal was producing the same results as the legacy application.</p> <p>The NYSERDA Program Portal was recognized as a great success by internal and external NYSERDA stakeholders. The NYSERDA Portal reduces complex business process between contractor and programs. In addition, there were significant process improvements by the analyst team between programs, contract and finance team by streamlining integration between systems for Pre-encumbrance, Encumbrance and Invoice Payment processes. Additionally, all data warehouse integrations are simplified due to a single platform and similar data model</p>				
PROJECT MEASUREMENTS				
Estimated Start & Completion Dates	From:	N/A	To:	N/A
Actual Start & Completion Dates	From:	7/17/2015	To:	Present

## Reference 3

PROSPECTIVE CONTRACTOR INFORMATION				
Name: Salesforce Portal (PHPC-HFD-NYK)		Contact/Name: Namrata Kumar		
Project Dates:		Contact Phone: 347-396-2269		

CUSTOMER INFORMATION				
Customer Organization: New York City Department of Health and Mental Hygiene (NYC DOHMH)		Customer Contact Name: Namrata Kumar		
		Customer Phone: 347-396-2269		
Customer Address: 42-09 28th Street, Long Island City, NY 11101		Customer Email: <a href="mailto:nkumar@health.nyc.gov">nkumar@health.nyc.gov</a>		
		Customer Fax:		
PROJECT INFORMATION				
<p>Project Objectives:</p> <p>External Partners are defined as any entity with which DOHMH conducts business (through grants or CTL) or has an affinity relationship. This can include schools, CBOs, healthcare providers, government agencies, insurance plans, hospitals, etc.</p> <p>The Public Health Partners Connect (PHPC) was developed to have a centralized solution for managing external partner relationships of the Department of Health and Mental Hygiene of New York City. To develop a highly configurable platform for internal and external partner management. The platform should have the following features:</p> <ul style="list-style-type: none"> <li>flexible for growth and changes</li> <li>interface capability with existing systems</li> <li>security partitioning for access control</li> <li>data governance to handle multiple data stewardship</li> </ul>				
<p>Project Description:</p> <p>The Project's goal does not only include typical CRM. The requested features of collaboration and interaction among partners, for mutual benefit and therefore for benefit of NY City's health goals, made it an interesting platform for Team MTX to propose and implement creative solutions on top of Salesforce. MTX built a phase wise incremental development.</p> <p><b>Phase 1</b></p> <p>Team MTX designed a consolidated ERD model in Salesforce considering not just the current requirements but with a vision of a future system for DOHMH.</p> <p>MTX defined data governance policies and access privilege matrices and prepared a detailed data dictionary.</p> <p>MTX built an integration layer with 2 major components:</p> <ul style="list-style-type: none"> <li>A home grown integration message switch built in java that utilizes salesforce API's</li> <li>Pentaho, a data integration tool for extraction and transformation of data from multitude of sources</li> </ul> <p><b>Phase 2</b></p> <p>Team MTX built 2 separate portals – Health Facilities Directory, New York Knows Directory – for 2 divisions. These 2 portals stand independent of PHPC portal. They had specific functionality to be addressed.</p> <p>Each of these community portals involved handling an external user base of ~200 each. Each user would have access to their organization's' data and can perform a series of interactions with DOHMH from the portal. They would also have ability to reach out to other users/partners in the portal.</p> <p>MTX exhibited the best practices for Salesforce administration for portal management. An extensive on-boarding plan was also prepared for first set of divisions (4/12) into Salesforce.</p>				
PROJECT MEASUREMENTS				
Estimated Start & Completion Dates	From:	N/A	To:	N/A
Actual Start & Completion Dates	From:	6/21/2018	To:	Present

### E.3 Litigation (Not Scored)

1. Provide details of any pending litigation or contracts Terminated for Cause or Convenience and associated reasons in which the Prospective Contractor has been a party within the last five (5) years. This should be limited to litigation or contract termination for the implementation and/or maintenance and operations of an electronic bidding solution.

There are no judgments, pending or expected litigation, or any real potential financial reversals which might materially affect the stability of MTX. No such condition is known to exist.

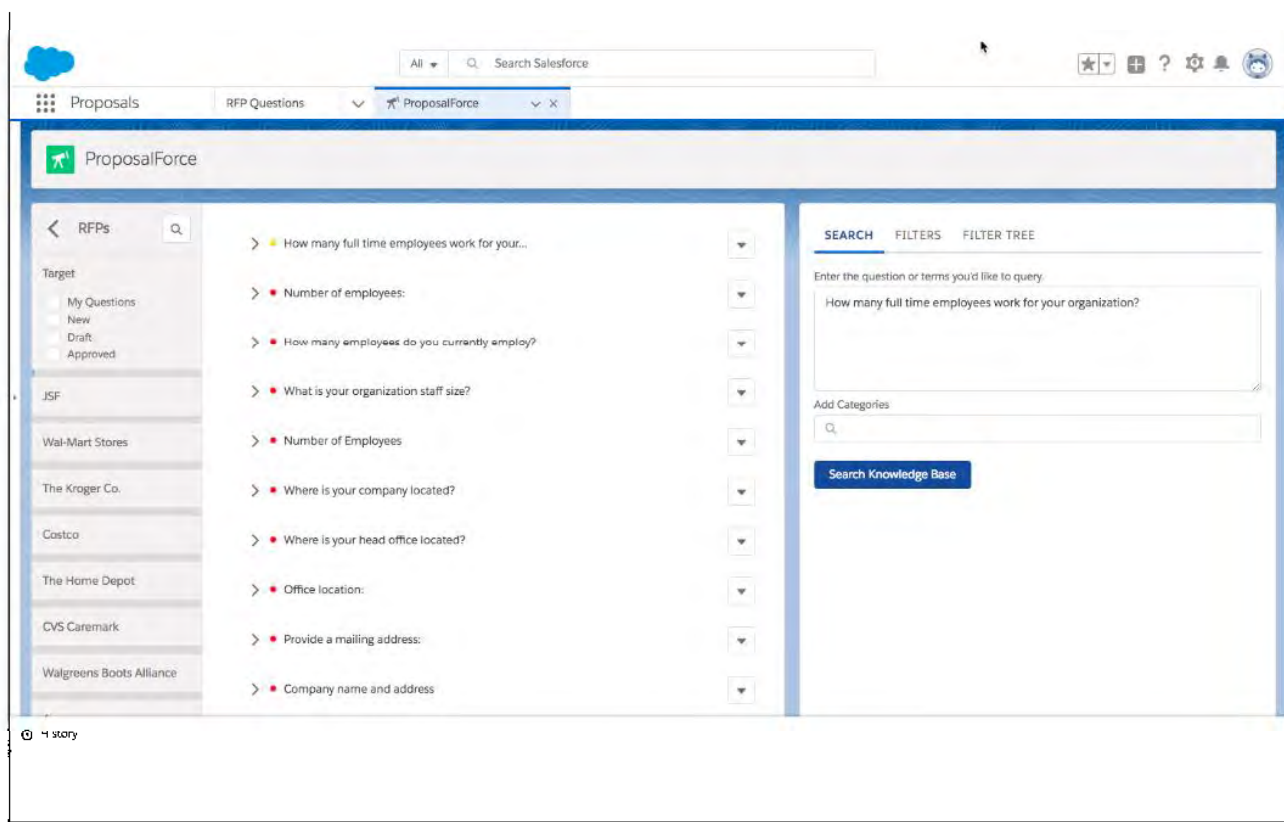
#### E.4 Understanding and Approach to Requirements (5 Points)

1. Prospective Contractor should provide detailed response regarding how their proposed solution meets each requirement listed in Section 2.4 of the RFQ. Responses may include screen shots or other descriptive information.

##### a. Bid Creation

1. Allow users to create, publish, and manage all solicitation types including but not limited to: Invitation for Bid (IFB), Request for Proposal (RFP), Request for qualification (RFQ), and Competitive Bid (CB).

The Proposalforce salesforce app allows users to create, search, and categorize RFP/RFI/RFx answers, track the status of RFPs and questions, assign them to users, and generate documents from questions and answers depending on Solicitation Type.



2. Allow users to upload and store multiple boilerplate/standard documents as templates.



Salesforce offers the following different ways to store, publish, and tag files and documents. All file types are supported from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs.

**Files Tab:** Upload, store, find, follow, share, and collaborate on Salesforce files in the cloud. For example, upload a file in Chatter and store it there privately until you're ready to share it. Share the file with coworkers and groups to collaborate and get feedback. Attach files to posts in a Chatter feed on the Home tab, Chatter tab, a profile, a record, or a group. Salesforce Files can be used with or without Chatter. With Chatter turned off, the Files tab (Files home) is available: upload, share, view, and manage files. You can manage topics for your files right from the detail page. Use topics to find files more easily and connect them to other records. You can update, add, delete, and track library members all from one place. Library admins can create and manage library memberships from Files Home. External users automatically get an "external badge" in the Current Member section to identify external partners, customer community members, portal, and Chatter users.

**Salesforce Content:** Publish and share official corporate files with coworkers and deliver them to customers. Documents are uploaded in Salesforce Content via a graphical user interface and a structured workflow process. This process captures key information related to the document, including file name, description, author, tags, document type, and any custom criteria you choose to collect. For example, Create, clone, or modify a document and save it so only you can see it and work on it. When you're ready, publish it so other users in have access to it. Create a content pack and send it to customers. In Lightning, you can create public links to share folders, giving recipients inside or outside access to sets of files. The public link is an encrypted URL. Folder Sharing in Lightning Experience provides an alternative to Content Packs in Classic. Anyone with the link can view and download the files in the folder. You can change the folder's contents at any time, and the changes occur in real time. To remove access to the folder, delete the link. To make the folder public again, create a new link.

**Salesforce Libraries:** In Lightning Experience, you can make libraries available to all users or a subset of users with or without Salesforce Content. In libraries, you can add multiple files to a library, update and delete library files, and move folders within a library. You can customize the fields and layout of the Files detail page and choose from standard fields to show when the file was last updated, file size, file type, and more. For additional information, please see: [http://releasenotes.docs.salesforce.com/en-us/summer17/release-notes/m\\_files.htm?edition=&impact=](http://releasenotes.docs.salesforce.com/en-us/summer17/release-notes/m_files.htm?edition=&impact=).

**Salesforce Knowledge:** Create and manage content, known as articles, in a knowledge base. Internal users and customers (on your Customer Portal, partner portal, Service Cloud Portal, or Salesforce Lightning Platform Sites) can quickly find and view articles they need. For example, write, edit, publish, and archive articles using the Articles Management tab or find and view published articles using the Articles tab. Customers and partners can access articles if Salesforce Knowledge is enabled in your Customer Portal, partner portal, Service Cloud Portal, or Salesforce Lightning Platform Sites. Create a public knowledge base so website visitors can view articles.

**Documents Tab:** Store Web resources, such as, logos, files, and other Visualforce materials in folders without attaching them to records. For example, add a custom logo to meeting requests by uploading your logo to the Documents tab.

**Attachments:** Attach files to records from the Attachments related list on selected detail pages. For example, add a file to a specific record, like an event, contact, or case by attaching it on the Attachments related list. Attachments exist in Salesforce only in the context of the record they're attached to. Files that users upload to the Attachments related list on records in Salesforce can also be set to become Salesforce Files objects. Once an Attachment is also a Salesforce File it can be shared with people, groups, libraries, and can be posted in feeds, synced, and updated with new versions.

- |   |
|---|
| <p>3. Support a variety of document/file types including but not limited to: .docx, .doc, .xls, .xlsx, .pdf, .tig, .jpg, .tiff, .csv.</p> |
|---|

General requirements related to salesforce files

Files formats supported include .docx, .pdf, .ppt, .pptx, .xls, and .xlsx

All image files are supported including .gif, .jpg, and .png

Files cannot be deleted from within Salesforce for Android and iOS



For File action to appear , feed tracking must be enabled on the object ( fields do not have to be tracked, but it must be enabled ) See Actions with or without Chatter

Android does NOT allow previews in .doc and .docx file types, iOS allows previews for .docx files.

100 MBs is the supported File upload size. Please keep in mind network bandwidth plays a critical role in the size of uploads, as well as the speed with which they are uploaded.

Files larger than 5MB may not be able to be previewed inside the app and will need to be opened in another program.

Using non-supported image files within formula fields (Ex. .ICO files) will not display within the mobile application.

The visible area for an Image Formula in the Salesforce for Android and iOS list view is 16 X 16 pixels. Using images larger than 16 X 16 will result in the image being cut off.

4. Allow users to upload multiple documents/attachments for a solicitation. Documents/attachments must not be limited in size and number.

Salesforce allows to upload documents and attachments for a solicitation along with drag and drop files functionality.

5. Provide the ability to create customized line-items for each solicitation.

Salesforce platform is very configurable with no code or less code. Customized line items can be incorporated per each solicitation using salesforce related list and custom objects.

6. Allow for the advertisement of solicitations to potential bidders.

This functionality can be accomplished with Salesforce outreach campaigns.

7. Allow the Public Agency to assign a bid number to each solicitation.

All Bids associated with a solicitation will be assigned a unique bid number out of the box with Salesforce

8. Provide the ability to edit and delete bids prior to release.

Salesforce allows the ability to edit or delete the bids prior to release using the permissions and profiles assigned to the users

9. Ability to download and print all solicitation documents.

Salesforce allows for download of documents and print them. Also the solicitation documents will be converted into a PDF document when generated from salesforce

## **b. Bid Management**

- 1.) Provide automated, electronic tracking of bid activity.

Salesforce Kanban to track the lifecycle of bids (meaning where each bid is in the process-- Released, Questions incoming, answers due, etc.).

- 2.) Provide an online question and response management tool for each solicitation
  - a) Public Agency must be notified as questions are received.

We could allow vendors to ask questions through a public facing community (with login if necessary;) After questions are submitted from vendor we can configure an alert for internal AR users. The lightning component page can be used for registration and after successful submission a case can be created internally and also notifications can also be sent to the internal users.

3.) Provide ability to amend the solicitation and create addenda.

Amend your contracts when a customer wants to add new products or change products that you've quoted or sold. Amend your contracts when a customer wants to add new products or change products that you've quoted or sold. If you don't have access to the contract record, you can amend from your opportunity. Additionally refer to [https://help.salesforce.com/articleView?id=cpq\\_amend\\_contracts.htm&type=5](https://help.salesforce.com/articleView?id=cpq_amend_contracts.htm&type=5)

4.) Ability to distinguish between mandatory and optional bid requirements.

Out of the box feature. Salesforce required fields with error messages

5.) Allow bidders to revise bids up to the bid closure date and time.

All bids entered will be available for editing and re-submitting until the bid closure date and time.

6.) Allow for the cancellation of a solicitation prior to or after a bid has closed.

With a public facing community we can have external users edit in the community and save to come back to later.

7.) Generate award, intent to award, and regret letters.

Award generation, Intent to award and regret letters can be generated as PDF;s and also can be sent as email notifications using the salesforce functionalities.

8.) Ability to include internal notes that are not available to vendors (i.e. project management, budgets, etc.).

Below feature can be used

Protect Sensitive Data with Private Notes

You rely on notes to streamline your workflow and increase productivity. With private notes, you can record sensitive information while keeping the note in context. You can also selectively share private notes.

Required Editions

Available in: the Salesforce app, Lightning Experience, and Salesforce Classic

Available in: Group, Professional, Enterprise, Performance, and Unlimited Editions

As you develop business relationships with your customers, you can become privy to confidential information.

You could learn about an upcoming product launch, or the timing of a new initiative. You want to record this information, but don't want everyone to be able to see it. That's when private notes come in handy.

You have these sharing options for private notes:

#### **Visible to Records**

Anyone with read access to the related record can see the note. Create and share the note without choosing any options.

#### **Privately Shared**

The note is visible only to the rep and people the rep has explicitly shared it with.

Note

NOTE Notes in the Notes & Attachments related list can't be made privately shared.

In Lightning Experience, open a note in the Notes related list and click Share. To maintain privacy, open the Who Can Access section and click Prevent others from sharing and unsharing.

In Salesforce Classic, open a note in the Notes related list, click Note Sharing Settings, then Sharing Settings. Select Prevent others from sharing and unsharing under the Who Can Access section.

#### **Private Only**

Only the owner of the note can see it. In Salesforce Classic, notes marked as private are visible to the owner and admins.

#### **Lightning Experience**

Create a note in the Notes related list and don't relate it to anything. By default, the note is private.

If you relate a note in the Notes related list to a record, click Share to Records and select Prevent note from being viewed by other users with access to this record.

Open a note in the Notes & Attachments related list, edit it, select Private, and save your change.

#### **Salesforce Classic**

Open a note in the Notes related list, click Note Sharing Settings, then Sharing Settings. Click Make Private and Make Private again.

Open a note in the Notes & Attachments related list, select Private, and save your change.

### **c. Bid Submission and Collection**

1. Provide electronic submission of solicitations via a secure connection.

Using Salesforce Communities - solicitations can be submitted via the secure SSL web forms.

2. Provide bidders the opportunity to upload and attach documents as part of the bid response.

This functionality is provided in Salesforce, documents can be uploaded to any record. Further, refer our response to Bid Creation section Q#2.

3. Allow for electronic or wet signature.

#### **For Electronic signatures incorporate salesforce with DocuSign**

CHOICE. DocuSign's extensive electronic signature integration with Salesforce is highly configurable & customizable for all Salesforce cloud solutions.

- Send, eSign & track agreements & approvals anytime, anywhere, & from any device
- Grow your business efficiently by digitizing legal documents, sales agreements, HR forms, & more.

TRUST. DocuSign meets the most rigorous security industry certification standards & uses the strongest commercially available data encryption technologies available.

EXPERIENCE. DocuSign for Salesforce is easy to use, implement & manage, driving immediate user adoption

- Over 80% of documents are completed in a day (95% faster)

14 of the top 15 global pharmaceutical companies, 12 of the top 15 global medical device manufacturers, and more than 100 hospitals are DocuSign customers

FEDRAMP authorized. eIDAS.

- eSign online or in person with one click
- Merge data from any object
- Dun & Bradstreet (D&B) Pre-Contract Due Diligence Solution
- Native integrations for Octiv, Apttus, OpenTrust, Nintex, Zuora, & more

4. Provide bidders with an electronic receipt showing the date and time of bid submission.

Email notifications are out of the box solution and workflow rules can be incorporated to send electronic signatures showing date and time for bid submission.

5. Seal bid until the date and time of the bid closing.
  - a. Pricing must also be sealed separately from technical submissions for certain solicitations (i.e. Request for Proposal).
    - i. For instances that require pricing to be sealed separately, an approval or other process must be in place in order to keep the pricing sealed until the Public Agency is ready to open pricing.

Records can be locked until the time of bid closing and this can be incorporated using read-only page layouts and record types.

Salesforce approval process is an automated process and your organization can use to approve records in Salesforce, An approval process is a combination of steps for a record to be approved and person has to approve it each step. A step can apply to all the records to that object or just record that meets certain criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

Simple or multi-step approval processes to automate and enforce the approval of virtually anything in your company.

6. Only allow specific users to open electronic bid submissions once the solicitation has closed.

## Profiles

A profile contains the settings and permissions that control what users with that profile can do within Salesforce. Profiles control:

- Standard and custom apps the user can view (depending on user license)
- Service providers the user can access
- Tabs the user can view (depending on user license and other factors, such as access to Salesforce CRM Content)
- Administrative and general permissions the user has for managing the organization and apps within it
- Object permissions the user is granted to create, read, edit, and delete records
- Page layouts a user sees
- Field-level security access that the user has to view and edit specific fields
- Record types are available to the user
- Desktop clients users can access and related options
- Hours during which and IP addresses from which the user can log in
- Apex classes a user can execute
- Visualforce pages a user can access

## User Roles

Every user must be assigned to a role, or their data will not display in reports and other displays based on roles. All users that require visibility to the entire organization should be assigned the highest level in the hierarchy. It is not necessary to create individual roles for each title at the organization, rather a hierarchy of roles should be defined to control access of information entered by users in lower level roles. When a user's role is changed, any relevant sharing rules are reevaluated to add or remove access as necessary.

## Record Types

If the customer's organization uses record types, edit the record type to modify which pick list values are visible for the record type. A default pick list values can be set based upon the record type for various divisions.

## Field-Level Security

Field-level security settings let administrators restrict user's access to view and edit specific fields on detail and edit pages and in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, Custom Links, and when synchronizing data.

The fields that users see in detail and edit pages are a combination of page layouts and field-level security settings. The most restrictive field access settings of the two always apply. For example, if a field is required in the page layout and read-only in the field-level security settings, the field-level security overrides the page layout and the field will be read-only for the user.

## Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.

Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets. You can assign permission sets to various types of users, regardless of their profiles. LFUCG can create permission sets to grant access among logical groupings of users, regardless of their primary job function.

See more information at: [https://help.salesforce.com/articleView?id=perm\\_sets\\_overview.htm&type=5](https://help.salesforce.com/articleView?id=perm_sets_overview.htm&type=5)

7. Ability to download and print tab sheets, vendor responses, submitted attachments, and any other documents related to the solicitation.

All documents can be downloaded from salesforce into local computer for any further printing purposes. Opening a submitted attachment will open the file within the browser further enabling to print or preview or download.

8. Allow specific users to track number of bids submitted prior to bid opening.

This can be accomplished using the salesforce reporting.

### d. Vendor Management

1. Provide a searchable database of bidders.

Salesforce global search which is out of the box can be used for searching the bidders

2. Notify registered vendors in specific commodity/service categories of the release of a solicitation.
  - a. Track all notifications along with the date/time provided to vendors.
  - b. Track email notifications by demographic.
  - c. Track non-deliverable emails.
    - i. Work with vendor to update email address.

Salesforce allows the features for Tracking of emails and below is the details.

### Organization-Wide Email Addresses

If your Salesforce org requires users to share a common email alias, you can define a list of organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

### Organization-Wide Email Footers

Let your users save time and apply common messaging to all emails sent from Salesforce by creating organization-wide email footers. You can create a separate email footer for each encoding and choose default email footers for single emails, mass email, and list email. In Lightning Experience, email sent via Gmail or Office 365 can contain an organization-wide email footer: you choose if it's included.

### Inbound Email Snapshots

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

### Guidelines for Working with Email

Consider a few pieces of advice for working with emails, including information for customers that use **Email-to-Case and Enhanced Email**.

### Using Images in Emails, Email Templates, and Enhanced Letterheads

Images can be used in email, email templates, and enhanced letterheads. Read more to understand the limitations.

### Enable Email Bounce Handling

With bounce handling, reps know which lead, contact, or person account has a bad email address, and they know which specific email wasn't delivered.

## Email Open Tracking and Email Opt Out

Keeping an eye on if and when customers open your outgoing emails is the best way to know if they're successful. You need to honor customer requests for different levels of email privacy; some customers don't want any email, while others may just want to get non-commercial email.

3. Allow a Public Agency to invite vendors to the solicitation that are not currently identified in the vendor database pool.

***This will be an email outreach campaign which can kick off as Solicitation becomes active. With a combination of workflow rules and process builders this can be accomplished with in salesforce.***

4. Allow vendors to register based on commodity/service criteria established by the Public Agency.

This is a public facing customer community registration page and commodity/service criteria can be included.

5. Allow vendors to complete demographic information as determined by the Public Agency and State law (i.e. minority business).

The public facing registration page can be used to capture the demographic information with validation rules.

### e. Public Agency Users

1. Provide access through a secure site with authenticated login and password.

Out of the box but would need to be configured by Salesforce. Customer Community.

2. Maintain unique username and password for each Public Agency user.
  - a. All activity must be auditable by user.

Using Salesforce Communities each user will have their own login and password. All user activity is by default captured in the audit and user activity within salesforce

3. Support multiple access levels within the system (i.e. read-only, read/write, approval, etc.).

Salesforce help control who sees what and provides a flexible, layered data sharing design that allows you to expose different data sets to different sets of users, so users can do their job without seeing data they don't need to see. Use permission sets and profiles to specify the objects and fields users can access.

#### Permission Sets

Object permissions specify the base-level access users have to create, read, edit, and delete records for each object. You can manage object permissions in permission sets and profiles

A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.

Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets. You can assign permission sets to various types of users, regardless of their profiles. The City can create permission sets to grant access among logical groupings of users, regardless of their primary job function.

Salesforce enables administrators to manage roles and relationships between roles from within the application, in a single easy to read page depicting the role hierarchy. The defined role hierarchy can be displayed in Tree View, Sorted List view or List View.

All users and application-level security are defined and maintained by the organization administrator, and not by Salesforce. The organization administrator is appointed by the customer. An organization's sharing model sets the default access that users have to each other's data.



There are four sharing models: Private, Public Read Only, Public Read/Write, and Public Read/Write/Transfer.

#### Private

Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records.

#### Public Read Only

All users can view and report on records but not edit them. Only the owner, and users above that role in the hierarchy, can edit those records.

#### Public Read/Write

All users can view, edit, and report on all records.

#### Public Read/Write/Transfer

All users can view, edit, transfer, and report on all records. Only available for cases or leads

There are also several sharing model elements: Profiles, Roles, Hierarchy, Record Types, Page Layouts, and Field-Level security. Details about sharing models and sharing model elements are provided below:

#### Profiles

A profile contains the settings and permissions that control what users with that profile can do within Salesforce. Profiles control:

- Standard and custom apps the user can view (depending on user license)
- Service providers the user can access
- Tabs the user can view (depending on user license and other factors, such as access to Salesforce CRM Content)
- Administrative and general permissions the user has for managing the organization and apps within it
- Object permissions the user is granted to create, read, edit, and delete records
- Page layouts a user sees
- Field-level security access that the user has to view and edit specific fields
- Record types available to the user
- Desktop clients users can access and related options
- Hours during which and IP addresses from which the user can log in
- Apex classes a user can execute
- Visualforce pages a user can access

#### User Roles

Every user must be assigned to a role, or their data will not display in reports and other displays based on roles. All users that require visibility to the entire organization should be assigned the highest level in the hierarchy. It is not necessary to create individual roles for each title at the organization, rather a hierarchy of roles should be defined to control access of information entered by users in lower level roles. When a user's role is changed, any relevant sharing rules are reevaluated to add or remove access as necessary.

#### Record Types

If the customer's organization uses record types, edit the record type to modify which pick list values are visible for the record type. A default pick list values can be set based upon the record type for various divisions.

#### Field-Level Security

Field-level security settings let administrators restrict user's access to view and edit specific fields on detail and edit pages and in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, Custom Links, and when synchronizing data.

The fields that users see in detail and edit pages are a combination of page layouts and field-level security settings. The most restrictive field access settings of the two always apply. For example, if a field is required in the page layout and read-only in the field-level security settings, the field-level security overrides the page layout and the field will be read-only for the user.

4. Provide ability to define workflow rules and approvals within the solution.
--

## Workflow Management and Approvals

Workflow management and process enactment are core strengths and foundational services of the Salesforce Platform that enable customers to easily automate business processes and operate more efficiently using point-and-click. Processes can be simple tasks - such as creating an activity, emailing an alert, updating a data field, or posting a message to a chatter feed - or more complex – such as sending data to external or third party systems and applications via an integration message, creating new records and updating existing related records, launching other processes/flows, submitting records for approval, and more.

The Salesforce Lightning Process Builder, together with workflow rules, actions and approvals enable you to rapidly design and run any business process in the cloud without infrastructure, software, or code. The Process Builder's simple and powerful design allows you to create your processes by using a convenient visual layout with point-and-click efficiency.

For every business rule or system event a customer needs to enact, one or more actions can be defined for execution when the specified conditions are met. These actions are created using point-and-click visual editors by a system administrator or business analyst and do not require complex procedural source code. Processes and workflow rules support several different types of actions.

#### **Salesforce Process and Workflow Actions:**

- **Create a Record** – Creates a new record (Account, Contact, Case, Event, etc.) in the system and sets the desired values in the new record's data fields. For example, in a 311 system, when a case's status changes to "Field Service Required", automatically create a new Work Order record, assign it to a technician and set a target completion date.
- **Update a Record / Field Updates** – Updates a field within the record for which the rule was created or a related record. Values can be set specifically, or can be calculated using related records and built in functions within the formula editor. In a Safety Tracking application, for example, when the status is changed to "Investigate Incident" the record could be automatically reassigned to the Safety Investigator and safety related fields could be auto-populated.
- **Quick Actions** – Quick actions are setup to help users more easily create and update records in the system. This selection invokes one of these object-specific or global quick actions for reuse in your automated process.
- **Tasks** – A task is an item assigned to a user to complete. Tasks for a user are visible from the Home tab of the application. Tasks have an assigned due date and are time-managed using reminders and past-due notifications by the application. In a sales application, for example, when new opportunities are created a series of tasks can be assigned to the sales rep to ensure timely follow-up and other sales related activities are conducted.
- **Email Alerts** – An email alert is an email automatically sent to one or more users which may include relevant data extracted from the record which caused the rule to fire. Salesforce includes Email template functionality, which includes HTML formatting and graphics within emails. In a case management system, for example, an email alert could be sent to the customer whenever a case is escalated to emphasize the urgency being given to their request or issue.
- **Post to Chatter** - Chatter is Salesforce's native collaboration tool which allows users and groups to monitor and follow social conversations around your business data. Chatter includes features like feeds, profiles, groups, and more to share information, collaborate, and keep up with the latest updates on topics or individual records of data (e.g. community resources, cases) within in your organization. In a Human Resources application, for example, the process could post a chatter message to a Recruiter's chatter group anytime a new candidate is created in the system.
- **Submit for Approval** – Automates the submission of the record that enacted the process for approval without end-user intervention. In an Expense Management application, for example, the process could automatically submit an expense record for manager approval when the expense amount is greater than \$50.
- **Outbound Messages** - Outbound Messages are SOAP-based web services that Salesforce automatically invokes on external systems when triggered. This is to support integration between Salesforce and external systems. Outbound messages actions are automatically generated from web service descriptor language (WSDL) files. For example, an outbound message could be used to send updated Account information to an ERP system whenever key fields are updated.
- **Launch a Flow** – Starts another flow from the current process to automate business processes that contain additional complexity and logic, without writing code. In a Benefits application, for example, a flow could be used to step a customer through an initial application process to collect required information and determine program eligibility.
- **Call Apex** – This action allows the invocation of methods programmed in the Apex language if highly customized functionality is required by your process. In a Facilities Management application, for

example, Apex could be used to process information and make a web service call to a legacy MRO (Maintenance, Repair and Operations) system.

### **Scheduled and Time Dependent Actions**

The process and workflow actions above may be classified as immediate or time-dependent/scheduled. Immediate actions are invoked as soon as the workflow rule is triggered. Time dependent actions are scheduled to invoke at some point in the future and are scheduled to occur in an hour or day count relative to the trigger time of the rule or a date/time field on the related record. Workflow rules may have both multiple immediate actions and multiple time-based actions.

### **Approvals**

An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that meet certain administrator-defined criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval. Approval processes can include email notification and support for email-based approval, including the ability for approvers to approve or reject directly from their mobile device.

You can create a process that another process can invoke. With invocable processes, you can reuse sections of your processes. Build one invocable process, call it from multiple processes or from multiple action groups in the same process. This ability to reuse can save you time.

See more information on creating workflow rules and actions at:

[https://help.salesforce.com/articleView?id=workflow\\_rules\\_new.htm&type=0&language=en\\_US](https://help.salesforce.com/articleView?id=workflow_rules_new.htm&type=0&language=en_US) and

[https://help.salesforce.com/articleView?id=workflow\\_select\\_action.htm&type=0&language=en\\_US&release=20.8.14](https://help.salesforce.com/articleView?id=workflow_select_action.htm&type=0&language=en_US&release=20.8.14).

### **Salesforce Platform Encryption (Additional Licensing Option)**

With Shield Platform Encryption, your organization can access encrypted data from most elements in flows and processes, except when filtering or sorting records. You can update the value for an encrypted field or reference an encrypted field in logic, but you can't look up records based on a specific value in an encrypted field.

Salesforce Workflow and Approval Processes are configured through the point-and-click Setup interface. Approval processes can include email notification and support for email-based approval. With the Salesforce mobile app, users can receive approval request notifications, tap a notification to view the administrator-selected approval page fields, and then tap Approve or Reject. The user can also submit comments with the approval or rejection and view the approval history related list for the record within the mobile app.

5. Allow each Public Agency the ability to maintain and assign user roles.

Refer our response to Q3 above

### **f. Technical**

1. Be accessible via any of the major commercially available web browsers, (e.g., Explorer, Safari, Firefox, Chrome, etc.) on any basic configuration Linux, PC or Mac computer.

Salesforce can be accessible by any of the major web browsers available.

2. Be hosted in the continental United States.

Salesforce has hosting locations in Chicago, IL, and Dallas, TX.

3. Provide security checks for attachments uploaded to the system (i.e. malware/virus protection).

In regards to internal operations, MTX has established policy and procedures for physical security, access,

and asset management. This includes physical access and virtual access to MTX premises and assets, including hardware and software. Access to these resources are provided to employees by Senior Management with the appropriate access and security based on the employee's job profile. Physical and digital security of the hardware and software include:

1. Locking the hardware and software in a secure location when it is not in use.
2. Changing the password as often as required by employer.
3. Ensuring that Company provided Anti-virus, Firewall, or Encryption software, if any, is functioning.
4. Use of personal assets are not permitted for any function of business or project work.

Corporate security, physical security, and asset security are incorporated into the employee on-boarding process and all corporate policies are communicated, including changes, to all employees.

In regards to project and client data, for many of our clients, MTX utilizes and implements Salesforce.com cloud computing and data storage. As per internal training, obtaining Salesforce Certifications, and ongoing training for our project resources, MTX utilizes Salesforce Trailhead training modules. Trailhead provides training specific to the Salesforce platform, security, and architecture. Privacy and security training includes:

US Privacy Law: <https://trailhead.salesforce.com/en/content/learn/modules/us-privacy-law-basics>

European Union Privacy Law: <https://trailhead.salesforce.com/en/content/learn/modules/european-union-privacy-law-basics>

Security Basics: [https://trailhead.salesforce.com/en/content/learn/modules/security\\_basics](https://trailhead.salesforce.com/en/content/learn/modules/security_basics)

Governance Basics: <https://trailhead.salesforce.com/en/content/learn/modules/governance-basics>

Cyber Resilience: <https://trailhead.salesforce.com/en/content/learn/modules/cyber-resilience>

Sharing and Visibility Design: <https://trailhead.salesforce.com/credentials/sharingandvisibilitydesigner>

User Management:

[https://trailhead.salesforce.com/en/content/learn/modules/lex\\_implementation\\_user\\_setup\\_mgmt](https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_user_setup_mgmt)

MTX provides training on corporate policy and procedures coupled with technology and project specific training (Salesforce Certifications) to ensure the proper handling and protection of sensitive government information.

4. Not require modification or installation of desktop components (i.e. client software).

Salesforce is a SAAS solution and the only requirement is the browser for using salesforce.

5. Post a link on the Contractors home page to Arkansas bid postings.

This can be accomplished by using salesforce communities and home page.

6. Provide the ability to post a link on the Public Agency website to the Contractor's solution.

Yes this functionality can be accomplished.

7. Allow the Public Agency access to all records for that agency.

Salesforce access is based on role hierarchy. All public agency users will be granted access to all records in the system.

8. Maintain an audit trail of all transactions.

### **Salesforce Core Auditing**

Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and

auditing features that provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include:

**Record Modification Fields** - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information.

**Login History** - You can review a list of successful and failed login attempts to the System for the past six months within Salesforce. The State can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary.

**Field History Tracking** - You can also enable auditing for individual fields (up to 20 fields per object), which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing.

**Setup Audit Trail** - Administrators can also view a Setup Audit Trail for the past six months within Salesforce, which logs when modifications are made to the system configuration. This trail can be downloaded into Excel or as a csv file.

While the Login History and Setup Audit Trail are available for six months within Salesforce, audit trails can be downloaded and stored locally to meet longer audit log retention requirements.

Detailed application logs can be used for forensics investigations by customers. These logs are stored for 18 months and are available for a fee.

### **Field Audit Trail**

Organizations desire certainty that their data is accurate, complete and reliable, enabling them to meet stringent industry regulations. With the addition of Field Audit Trail, The State's ability to track changes at the field level increases from 20 fields (core auditing) to 60 fields per object (Field Audit Trail), and the audit logs availability increases from 18 months (core auditing) to 10 years (Field Audit Trail). The State can also set different policies for each Salesforce object to ensure data is purged when no longer needed.

For more information, see the Field Audit Trail data sheet at:

[https://secure2.sfdcstatic.com/assets/pdf/misc/Platform\\_FieldAuditTrail\\_Datasheet.pdf](https://secure2.sfdcstatic.com/assets/pdf/misc/Platform_FieldAuditTrail_Datasheet.pdf)

9. Maintain/store all information pertaining to a bid for a minimum of five (5) years.

All the records and data in salesforce will be retained forever unless you purge them and download.

10. Provide data export functionality in the following formats at a minimum: comma delimited, tab delimited, and XML.

Salesforce offers two main methods for exporting data.

**Data Export Wizard**—an in-browser wizard, accessible through the Setup menu. It allows you to export data manually once every 7 days (for weekly export) or 29 days (for monthly export).

**Data Loader**—a client application that you must install separately.

11. Provide a robust reporting feature.

Salesforce offers a powerful suite of analytics and reporting tools to help you view and analyze your data. Salesforce analytics consists of several integrated parts:

### **Report Types**

A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of pre-defined standard report types; administrators can create custom report types as well. For example, an administrator can create a report type that shows only job applications that

have an associated resume; applications without resumes won't show up in reports using that type. An administrator can also show records that may have related records—for example, applications with or without resumes. In this case, all applications, whether or not they have resumes, are available to reports using that type.

## Report Formats

Salesforce reports can use the tabular, summary, matrix, or joined format:

Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total. Examples include contact mailing lists and activity reports.

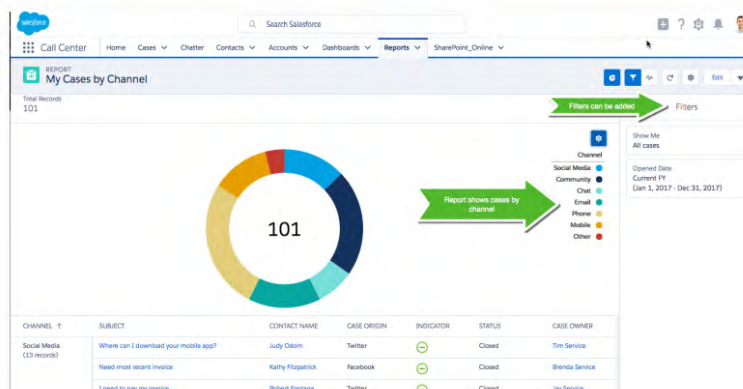
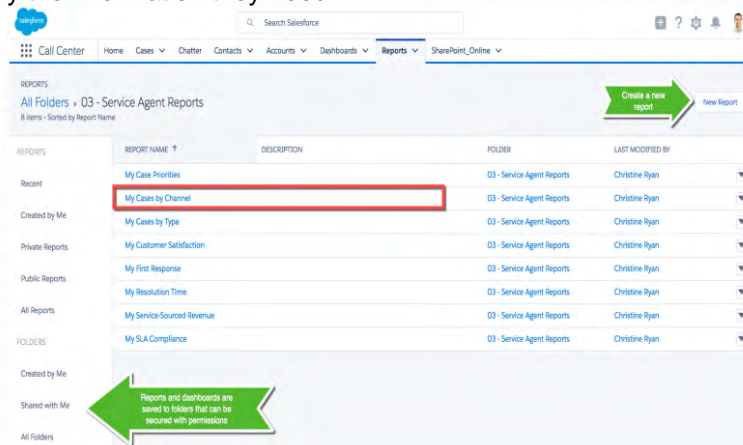
Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. This type of report can be used to show subtotals based on the value of a particular field or when a hierarchical list is desired, such as all Cases for your team, subtotaled by Status and Owner.

Matrix reports are similar to summary reports but allow users to group and summarize data by both rows and columns. This type of report can be used for comparing related totals, especially if there are large amounts of data to summarize and users need to compare values in several different fields, or users want to look at data by date and by type, person, or geography.

Joined reports let users create multiple report blocks that provide different views of the data. Each block acts like a “sub-report,” with its own fields, columns, sorting, and filtering. A joined report can even contain data from different report types.

## Reports

A report returns a set of records that meets certain criteria and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. To help you monitor the system, Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All our standard reports are “templates” so they can be used as report starting points from which users can alter fields, criteria, etc. and use the “Save As” function to easily capture a version more specific to their unique needs. Users can also create new custom reports to access exactly the information they need.



Figures: Example Salesforce Report for YTD Service Cases initiated from a customer on the Salesforce Customer Community web portal



View a short (3:16) video on how to use the Report Builder in Salesforce:  
[https://www.youtube.com/watch?v=7\\_LkmrhKf2g](https://www.youtube.com/watch?v=7_LkmrhKf2g)

Report performance varies by report complexity, including the number of table joins required to produce report results. Most customer reports are executed in just a few seconds. There are some factors that can cause a report to perform poorly or to time out. Most of them can be addressed by simple changes, such as using the correct filter operators, increasing the number of filters, and reducing the amount of data. View Salesforce's Tutorial on Creating Reports with the Report Builder in Trailhead:

[https://trailhead.salesforce.com/en/modules/reports\\_dashboards/units/reports\\_dashboards\\_getting\\_started](https://trailhead.salesforce.com/en/modules/reports_dashboards/units/reports_dashboards_getting_started)

## Dashboards

A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or custom Visualforce pages. They provide a snapshot of key metrics and performance indicators. Each dashboard can have up to 20 components. Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards. To view a dashboard component, users need access to the folder for the underlying source report. Each dashboard has a running user, whose security settings determine which data to display in a dashboard. Your Data with the Lightning Dashboard Builder in Trailhead:

[https://trailhead.salesforce.com/modules/lex\\_implementation\\_reports\\_dashboards/units/lex\\_implementation\\_reports\\_dashboards\\_visualizing\\_data](https://trailhead.salesforce.com/modules/lex_implementation_reports_dashboards/units/lex_implementation_reports_dashboards_visualizing_data)

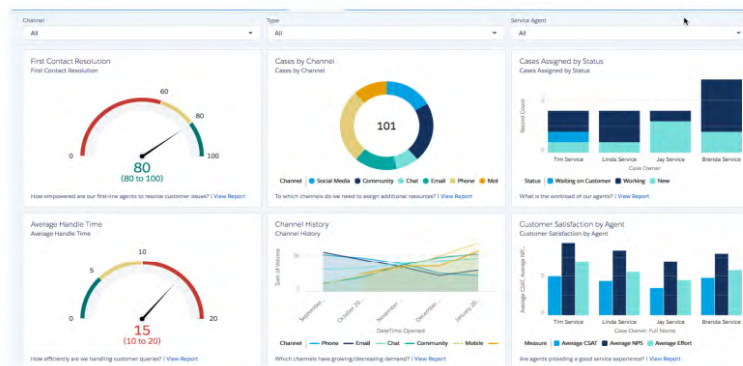


Figure: Example customer service dashboard

View a short (3:25) video on Salesforce Dashboards: <https://www.youtube.com/watch?v=a6lCrNnotiY>

## Folders

A folder is a place where you can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to its contents based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization or make it private so that only the owner has access.

## Analytic Snapshots

An analytic snapshot lets you report on historical data. Authorized users can save tabular or summary report results as snapshots on a schedule. Analytic snapshots let you to work with report data similarly to how you work with other records in Salesforce.com. For example, a customer support manager could set up an analytic snapshot that reports on the open cases assigned to his or her team every day at 5:00 PM, and store that data in a custom object to build a history on open cases from which he or she could spot trends via reports. Then the customer support manager could report on point-in-time or trend data stored in the custom object and use the report as a source for a dashboard component.

Two other important points about dashboards:

First, dashboard components aren't simply nice-looking, static pictures. They're live, actionable objects. You can click on a dashboard component to drill down to the underlying report that generated it and click on any item in that report to drill down to the source data. So, you can quickly understand the reasons behind the results.

Second, dashboards are full participants in Salesforce's enterprise social collaboration platform. For example, a manager could post a dashboard snapshot to their Chatter feed to share it with their "followers", or to a

specific Chatter group, along with comments, so that they can find answers, congratulate team members, or issue calls to action. And both dashboards and Chatter are available on mobile devices, as well as PCs.

### **Einstein Analytics Platform**

Salesforce Einstein Analytics Platform is a cloud-based platform designed for the business user to get answers to questions instantly through powerful, interactive visualizations of any data, on any device.

Salesforce core Reports and Dashboards deliver operational and performance metrics on data that lives solely in Salesforce and allows State department to easily create individual static reports and dashboards to gain real-time views of daily activity.

Salesforce Einstein Analytics Platform, on the other hand, is an analytics system - designed to analyze data not just from within Salesforce, but from across different sources, and be surfaced across State department. Einstein Analytics Platform offers:

- Multi-year trending analysis - Supports query and processing of hundreds of millions of rows of data from various sources
- Cross Object analysis and faceting
- Rich data visualization, including thematic maps
- Dynamic self-service exploration



The Action Framework enables Salesforce users to take actions directly at the point of insight from within any Einstein Analytics dashboard. For example, once an agent has uncovered an insight about a case, the Action Framework seamlessly connects to Service Cloud workflows and records so that agents can instantly assign a task, escalate a case, update a ticket, or share best practices, all within the point of analysis.

Einstein Analytics Platform is mobile-ready, and you can immediately collaborate and share insights with team members right inside Salesforce. With Einstein Analytics Platform, the State Department can quickly query and explore data across CRM, ERP, Excel, as well as social and mobile applications to get exactly the information you need without being stuck in a pre-built report. Unlike legacy Business Intelligence or desktop discovery tools, Einstein Analytics Platform is built native in the cloud giving you the advantage of massive scale and taking only weeks to get up and running. The State Departments data is secure. Powerful field level security and role-based hierarchy controls ensure the right people have the right answers.

12.) Perform daily system backups to store and protect data against technical/hardware/software failure, unauthorized access, and attacks.

Customer data, up to the last committed transaction, is replicated to disk in near-real time at the designated disaster recovery data center, backed up at the primary data center, and then cloned to the disaster recovery data center. Disaster recovery tests verify our projected recovery times and the integrity of the customer data.

Backups are performed daily at each data center facility without stopping access to the application. Backup cloning is transmitted over an encrypted network (our MPLS network across all data centers). Backups never leave our secure data center facilities, unless they are to be retired and destroyed through a secure destruction process.

The backup retention policy is 90 days (30 days for sandboxes). Deleted / modified data cannot be recovered after 90 days (30 days for sandboxes). If customers want a longer retention, they can use the weekly export feature available in the system.

13.) Interface with a Public Agency's eProcurement solution.

MuleSoft's Salesforce integration solutions make it easy to integrate CRM, ERP, and other applications.

### **g. Implementation**

1. Provide complete installation/implementation of the contracted Public Agencies instance of the solution.

Many implementation projects suffer from common pitfalls that cause schedule slippage and cost overages. Effective processes and methodologies have been developed to minimize and eliminate these risks. Some of these processes are articulated below:

### Identifying and scoping missed requirements

- ✓ Our process of capturing detailed requirements ensures requirements are elicited exhaustively.
- ✓ Iterative development and deployment ensures that end users are fully engaged with real systems and missed items can be corrected long before code is deployed to production.

### Strict adherence to SCRUM-Agile processes

- ✓ Develop and test riskiest components first. A major architectural change later in the project phase can have many ripple effects. MTX plan includes comprehensive test scenarios that cover all aspects of a system build.
- ✓ Each iteration is a fully deployable unit of code that covers end-to-end functionality of a specific section of the overall system. This enables users to thoroughly test specific sections as they are completed, and streamlines final user acceptance testing at the conclusion of the project.
- ✓ Our continuous integration testing process allows us to minimize defects early on, thus enabling us to deliver a quality product.

### Testing / Quality Assurance

- ✓ Cost to fix a defect increases logarithmically the later in the project phase it is discovered. The cost to fix a bug at the design level is 100 times cheaper than catching the defect in production. Processes include random code reviews to identify defects early in the product life cycle as well as always testing of key components/transactions to uncover bugs early and provide rapid fixes with confidence. This also reduces total cost of ownership for the system.

## At MTX we employ the Agile-Scrum Methodology for Project Management

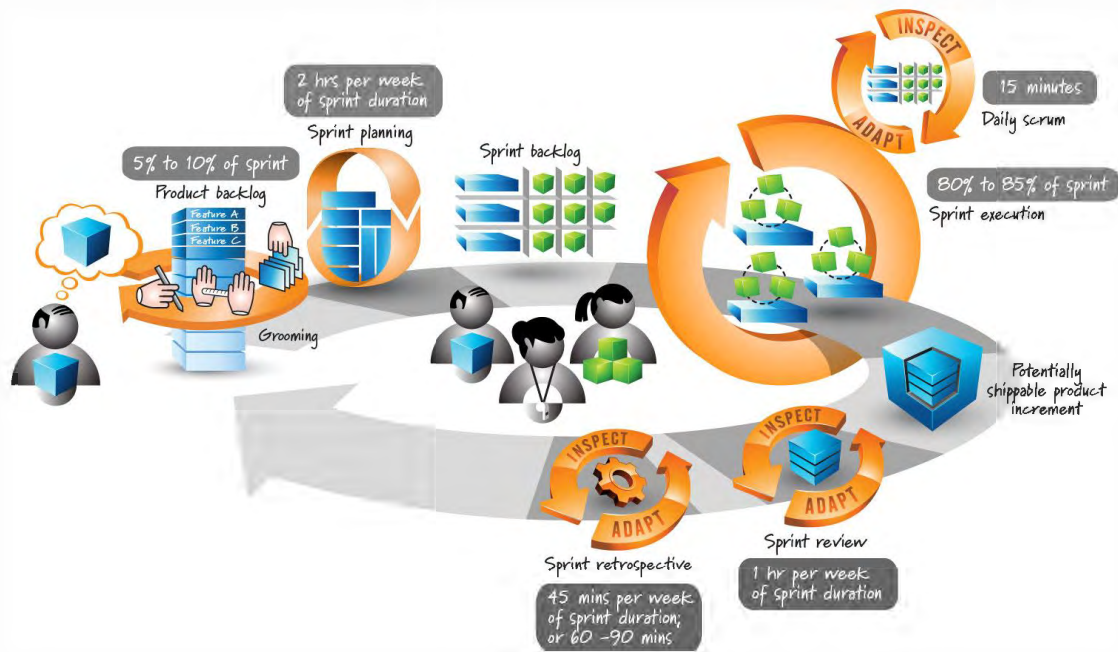
### Our Approach and Methodology

Using the Agile-Scrum Methodology, MTX's initial project plan is designed to leverage existing development and other technical management processes already in place. This accelerates the initial planning phases and will establish strong communication channels between MTX & the State Department's development and release management teams. The approach also identifies products and user stories that represent reusable data, processes and output standards. We refer to these reusable products and story standards as the System "Core".

The Agile-SCRUM methodology is depicted in the diagram above and consists of the following major milestones:

- **Phase I:** Discovery & Design, done in close collaboration with client stakeholders, focused on building upon the work completed to date to conduct the necessary level of upfront planning, requirements definition, analysis, and solution definition.
- **Phase II:** The Build, Validate and Deploy steps are then delivered via a subsequent iterative, sprint-based agile delivery. These phases also include client stakeholder review and approval points, at milestones and during each sprint review.
- **Phase III:** Post-Deployment will be provided for continued advisory services, Salesforce platform administration, and ad-hoc design and development post-Go Live.





## Phase I: Discovery & Design

- Project initiation: “Pre-flight” project planning sessions (2-3 meetings currently assumed to review and align on project management monitoring and control methods, status meeting planning, collaboration environment setup, etc.)
  - Identifying project stakeholders and their respective roles & responsibilities
  - Communications planning
  - Scheduling weekly status meetings
  - Develop a project plan/work breakdown structure (WBS) with project work streams, tasks, owners, dependencies, timeline, and key milestones which will be kept up-to-date throughout the project
- Data gathering sessions, including preparation and conduct of facilitated work sessions with Client business and IT stakeholders
- Development of the Release 1 Planning Guide, including:
  - Business objectives and Key Performance Indicators (KPIs)
  - Prioritized use cases along with functional and nonfunctional requirements
  - Detailed user stories with acceptance criteria
  - Deployment roadmap (Release 1 and future releases)
  - Technical implication considerations (e.g. Security, SSO, data retention, etc.)
  - Business and operational implication considerations (e.g. communications, content planning, activation and adoption, training, governance, organizational structure & role descriptions and ongoing moderation and management)

**Milestone:** The key outcome of the Define activities is confirmed project requirements that provide the basis of the solution design in the subsequent step.

## Design

Design activities build upon the information established during the above steps to develop the final solution design. There are two focus areas of the Design phase: Technical Solution Design and User Experience Design. Activities include:

### Technical Solution Design

- Prepare and facilitate discovery sessions with stakeholders to inventory, discuss, and analyze the current data and content formats, along with technical environment(s)
- Design Salesforce data model and recommendations using existing Salesforce constructs and leveraging the ERD as input
- Develop the technical solution design using native Salesforce features, Community Cloud configurations, workflows, and processes in order to technically deliver the requirements

### User Experience Design

- Review brand/style guides and other visual design assets. Develop a visual style that integrates with the overall brand identity but is unique for this solution.
- Develop the information architecture (IA), including taxonomy, sitemap navigation schema, interface content and naming conventions
- Develop interactive wireframes/prototypes/flows that depict key page templates/layouts, content types and organization and interaction design of all landing pages and key interior pages and user flows
- Develop the applicable visual design concepts that convey the look and feel of the solution

**Milestone:** The key outcome of the Design activities is an approved technical solution design along with user experience design concepts (including the sitemap, wireframes and user flows), which will comprise the “blueprint” for the subsequent Phase II.

## Phase II: Build, Validate, Deploy

### Build

The Build phase includes the build-out, configuration, and testing of the first major release of the solution as defined and approved during the Phase I activities. This phase is organized around a series of agile-based sprints, with specific activities during this phase to include:

- Pre-Sprint Planning – Using the requirements that were gathered during the Define and Design steps, work with State Department’s stakeholders to prepare for development activities. This process will consist of:
  - Story Writing – The requirements gathered during the Define step will be migrated to MTX Beans project management tool instance in the form of Agile epics and users stories with acceptance criteria.
  - Organizing & Scheduling Sprint Cadence – Department’s participants in the Sprint cadence will be identified and key meetings (e.g. Sprint Planning, Sprint Reviews) will be scheduled across the development sprint cadence.
- Development Sprints – Based upon the backlog of requirements, an iterative set of development Sprints will be defined for this project, during which the backlog will be incrementally groomed and deployed to the development environment. Each iterative Sprint will be comprised of:
  - Sprint Planning – Includes reviewing the backlog, confirming requirements with stakeholders, prioritizing the backlog items, sizing the effort of the backlog items and committing one Sprint’s worth of backlog items to be delivered during the upcoming Sprint.
  - Sprint Execution – The MTX Delivery Team will complete development and unit testing for the committed Sprint items.
  - Sprint Review – The MTX Delivery Team will present the Sprint’s accomplishments to stakeholders for acceptance in the development environment. Anything that does not meet Department’s approval during the Sprint review will be reverted to backlog and addressed in a subsequent Sprint.

### Validate

- Quality Assurance (QA) Testing - Following the final Sprint, MTX will deploy the Solution to a pre-production environment as appropriate to confirm that the work accomplished in the Development Sprints performs to specification.
- Change Management/Training Development: Per the approved training plan, support of the development of training, activation and communication content, along with preparation for the execution of training and communications plans.
- User Acceptance Testing (UAT) - Release 1 culminates by inviting a small-scale set of end-users to interact with the system. The goal of the UAT step is to gather end-user feedback to inform subsequent releases and to gain experience with business process changes related to the new system.

**Milestone:** The key outcome of the Build and Verify steps is to obtain Client approval to Go Live.

### Deploy

The purpose of the Launch step & Post-Launch-Support phase is to deliver the solution to end-users and to transfer the management of the system to Department resources, as well as to effectively support the solution following the launch and Go-Live activities. Activities include:

- Training/Communication Plan Execution: Per the approved training and activation plan, support the execution of specific training, communication and activation activities, including train-the-trainer sessions.
- Go Live Planning & Checklist – Prepare the various technical assets and configurations in the pre-production environment that need to be promoted/applied in the Production environment. Includes coordination with Salesforce Support Services and Department’s IT teams as necessary



- Go Live Deployment – The physical deployment during which the customizations and configurations from the pre-production environment are applied to Production. Final “smoke testing” is conducted as appropriate to execute test cases necessary to validate the end-to-end functionality of the solution in the Production environment.
- Documentation & Knowledge Transfer – Provide technical and functional design documentation that describes the solution along with a User Guide that describes basic functionality. In addition, knowledge transfer meetings and technical support will be provided to Department’s IT Development and Support teams.

### **Phase III: Post-Deployment Support**

MTX offers Post-Launch Support services following the Go Live. These can be tailored to the client, based on their internal capabilities and preferences for MTX’s ongoing involvement with the program post-launch

### **Beans Project Management Tool**

MTX utilizes a Salesforce powered project management tool (beans) to track project development and collaborate with client project managers from the initial project scoping phase all the way to the end of the post go-live support phase. Using this tool to enforce the scrum-agile process is key to the project’s success. Beans features include:

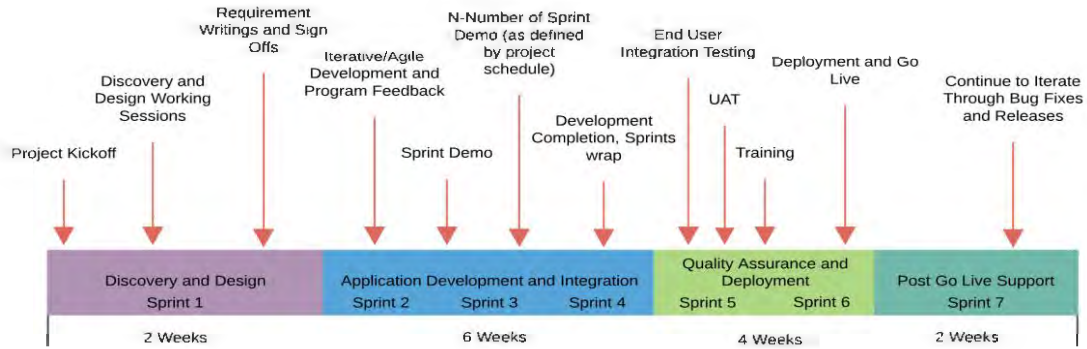
- Tracking sprints, stories and development tasks using detailed requirements and due dates
- Assigning action items to both users from the MTX side as well as the State’s side which will send notifications when an action item is overdue.
- Tracking issues/bugs found with completed development on the story and/or task level
- Creating test cases for all production deployments and sprint closures.
- Reports and Dashboards tracking overall project status as well as sprint by sprint status
- Chatter functionality (similar to Facebook or Twitter) allows visible user to user conversation history on a sprint, story or task level
- Attach necessary files & documents to tasks, sprints, issues etc.

### **Project Governance**

With the Center of Excellence approach, MTX comes prepared with a governance structure that integrates the State department’s operations management and delivery teams into a cohesive organization. This will allow our joint team to make informed business decisions and provide the right level of governance and toolsets to support the delivery of efficient and effective system development within budget and with the highest quality. By maintaining a 360 degree view throughout the project lifecycle, MTX knows the importance of focusing on outcomes and benefits.

Our defined and tested project governance model ensures adequate communication across all tiers of the project as well as timely resolution and escalation of issues. It relies on three key activities. First, we must facilitate regular stand-up meetings to ensure coordination between the involved teams. These meetings are to be led by project management with the core team members in attendance. Staff will review accomplishments, upcoming activities and resolve blocking issues. Second, there must be a weekly project status review to examine weekly status report and issue log. This meeting is mandatory for all development team members, with participation of key stakeholder, technical and business leadership as required. This meeting will act as the vehicle for the first level of issue escalation and resolution for project execution issues, metrics and tracking to ensure project health. Before each meeting, agendas must be published and participants must come prepared to resolve any escalated issues.

Here is an example for implementation in weeks followed by 4 weeks for End User Integration Testing, UAT, Training, and Deployment. This will be followed by 2 weeks of Go live Support, including knowledge transfer and bug fixes through iterative releases. The overall high level plan is mentioned below. Please note, this is just an example, the final timelines and deliverables will be decided post project kick off.



Sprints	Project Stages	Deliverables
Sprint 1	Discovery and Design	<ol style="list-style-type: none"> <li>1. Conduct Project Kickoff Meeting</li> <li>2. Work Plan with Milestones</li> <li>3. Requirement writings and Sign Offs</li> </ol>
Sprint 2-4	Application Development and Integration	<ol style="list-style-type: none"> <li>1. Iterative/Agile Development and Program Feedback</li> <li>2. Sprint Demo</li> <li>3. N-Number of Sprint Demo (as defined by project schedule)</li> <li>4. Development completion, sprints wrap</li> </ol>
Sprint 5-6	Quality Assurance and Deployment	<ol style="list-style-type: none"> <li>1. End User Integration Testing</li> <li>2. Conduct User Acceptance Testing</li> <li>3. Training</li> <li>4. Deployment and Go-live</li> </ol>
Sprint 7	Post Go-Live Support	<ol style="list-style-type: none"> <li>1. End User Support Plan</li> <li>2. Business Continuity Plan</li> <li>3. Documentation of Operational Procedures</li> <li>4. Provide Software Installed, Configured, and Operational to Satisfy State Requirements</li> <li>5. Cutover to New Software</li> <li>6. Provide Documentation</li> <li>7. Conduct Project Exit Meeting</li> <li>8. Project Status Reports(All Sprints)</li> <li>9. Continue to iterate through Bug fixes and Releases</li> </ol>

2. Work with Public Agency to develop an implementation plan that is agreed upon within thirty (30) days of Public Agency contract award.

As a part of the MTX Project Delivery Methodology we use the opportunity to develop a timeline and project plan upfront before the project kick off. We agree to develop a project plan within 30 days after the contract award.

**h. Customer Service and Support**

1. Provide training for each contracted Public Agency. Training must be comprehensive and provide users with all the knowledge necessary to utilize the system.

a. Training updates must be provided as new versions and upgrades are implemented.

End-user training is one of the keys to a successful implementation. MTX will establish a well-defined knowledge transfer and training process that will provide the State with a complete view of their new solution from introduction and basic usage patterns to system administration and configuration. During the

implementation phase, MTX team will prepare system documentation to be leveraged during post-implementation training, to facilitate efficient knowledge transfer. These documents will summarize system requirements, capabilities as well as detail system operations, and system configurations. During the project initiation phase, MTX team will assess specific requirements and expectations and agree to final documentation deliverables.

Our training processes consider all key stakeholders including system end users, system administrators, management, and IT staff. Training includes instruction, training manuals, and hands on experience that is reinforced during the user acceptance test (UAT) phase. We understand that an effective training and knowledge transfer process can encourage user adoption and minimize productivity losses associated with the implementation of a new solution.

Some typical examples of standard deliverables include:

- Technical Release Notes
- System administration Guide
- End-user training guide

These documents will be made available to the client team members and end-users, and they become part of the online library of resources that can be leveraged as self-support or reference tool, even after the go-live phase.

Furthermore, Salesforce incorporates the following training resources and best practices as part of the proposed subscription service as well as additional Salesforce instructor-led training that is available for an additional cost.

### **Salesforce Help & Training Portal**

Salesforce provides an intuitive help and training portal which brings together a rich set of resources that would give the State a centralized way to help solve problems quickly and easily. Salesforce also provides context-sensitive help icons throughout the application screens to make it easier for users to get unique help without searching. It is notable that we don't provide large, offline help manuals but rather, all our help is online so we assure that online help is extremely thorough and effective for usability.

The Help site:

- Is fully customizable - You can personalize Help to meet your specific needs, customizing the gadget layout to show what is important to you
- Allows users to get the right answers, fast - Knowledgebase is more intelligent and comprehensive than ever (Auto Suggestion of Search Terms, Expanded Knowledge Repository [Help Docs, Solutions, FAQs, Training, Best Practices], and Refinement by Dimension)
- Provides chat - This engagement Channel gives customers the ability to chat with the Salesforce support team in real time
- Has easy case management - Opening and reviewing cases is easier than ever
- Makes your administrator's life easier - Administrators gain insight with enhanced reporting on cases and organization information

Users of the Salesforce mobile app can troubleshoot more of their problems and work more efficiently on the go. Accessing the help portal is the same as always—users just tap Help in the navigation menu to receive condensed information based on real use cases as well as feature information.

### **Salesforce Printable Tip Sheets & User Guides**

In addition to the online help, Salesforce publishes printable documentation to help you be successful with Salesforce. These documents include tip sheets, user guides, and other resources that describe the features and capabilities of Salesforce. Link here for Getting Started information:

<https://pages.mail.salesforce.com/gettingstarted/home/> and here to Salesforce's online documentation: [https://help.salesforce.com/articleView?id=salesforce\\_help\\_map.htm&type=5](https://help.salesforce.com/articleView?id=salesforce_help_map.htm&type=5).

### **Customer Success Community**

Customer Success offers many resources and tools to get started, including the Customer Resource Center (success.salesforce.com) with online Help, Learning Center and Communities, where you can tap into training videos, a knowledgebase, or reach out to other customers for best practices.

Ongoing success monitoring is a key part of Customer Success. Salesforce's cloud computing model enables us to monitor usage data, to determine whether customers are getting the most from their subscription. We share this information with customers through Personal Account Reviews and Success Scorecards, along with actionable recommendations for improvement. Customer Success offers programs to help customers roll out new features or products, with training and adoption toolkits, to ensure our customers' business benefit is always growing, and that they remain customers for life.

### **Trailhead: the Free, Fun Way to Learn Salesforce**

Everyone can learn Salesforce. Whether you are an admin, user or developer, there is a learning trail for you.



Customers can sign up for a free Developer edition account and take advantage of the fun and free interactive learning curriculum provided at Salesforce Trailhead (<https://developer.salesforce.com/trailhead>). Users can pick specific trails, modules or projects based on role (admin, user, etc), experience level (beginner, intermediate, advanced), products (Service Cloud, Salesforce Platform, etc) or topics (App Logic, CRM, Data Management, etc) to learn new skills and absorb the information they need quickly.

- Trails - There are over 102 trails to choose from that provide guided learning paths through modules and projects and help users cover the most ground in the shortest amount of time. They provide users a game plan for exploring new skills. Trails include Admin Beginner, Admin Intermediate, Developer Beginner, Develop Intermediate, CRM Essentials, Analytics, and many more.
- Modules - There are over 347 modules that dive into specific topics. Modules introduce users to specific topics in bite-sized units. Users learn what a feature is, when it's helpful, and how to use it. Users can then test themselves with interactive challenges.
- Projects - there are over 66 projects to choose from that provide users hands-on practice applying what they've learned. Projects give users hands-on practice with Salesforce technologies via step-by-step instructions and enable users to gain new skills and confidence working in Salesforce faster than they thought possible.

### **Salesforce Premier+ Success Plan**

With the Premier+ Success support plan, which includes support, training, and administration, the State will have unlimited access to our complete library of more than 100 online courses to build expertise in Salesforce products, drive value, and maximize ROI.

### **Additional Salesforce Training**

Should the State desire instructor-led training in addition to online training and training that is included in the Premier+ Success Plan, for an additional cost, Salesforce offers a number of instructor-led courses tailored for user types. More information is provided at: <https://www.salesforce.com/services/learn/classes/#!page=1>

Salesforce provides comprehensive training and certification options for every Salesforce user whether Administrator, Developer, Business Analyst, and others. Putting the right training plan in place for all Salesforce users is essential to a successful ongoing deployment. Salesforce Certification provides assurance that the team responsible for your Salesforce deployment is an expert in their field and up-to-date on the latest capabilities from Salesforce. As your team gets trained, certification is an important milestone to demonstrate readiness. And as you hire and contract with Salesforce Partners, be sure to look for Salesforce Certified Professionals to ensure that you are getting the right level of expertise, whether that is Certified Administrators, Developers, Solution Designers, or Technical Architects.

Training is available as:

- Self-paced, online courses as part of Premier Success Plan subscription
- Instructor-led classes delivered by Salesforce Certified Instructors at our facilities and through our Partners worldwide
- Private training classes held at your facilities, delivered by Salesforce Certified Instructors

For a complete list of courses, review the course catalog at [www.salesforce.com/training](http://www.salesforce.com/training). Learn more about the benefits of Salesforce Certification at [www.salesforce.com/certification](http://www.salesforce.com/certification)

- |   |
|---|
| 2. Provide online support tools including but not limited to: user manuals, tutorials, frequently asked questions, etc. |
|---|

Refer section "Salesforce Help and Training portal" section and "Trailhead" section in the response above.

- |  |
|--|
| 3. Provide telephone support Monday through Friday between 8:00 a.m. and 5:00 p.m. CST, excluding Public Agency holidays. (Note each Public Agency may have a different holiday schedule). |
|--|

MTX Support services are listed below



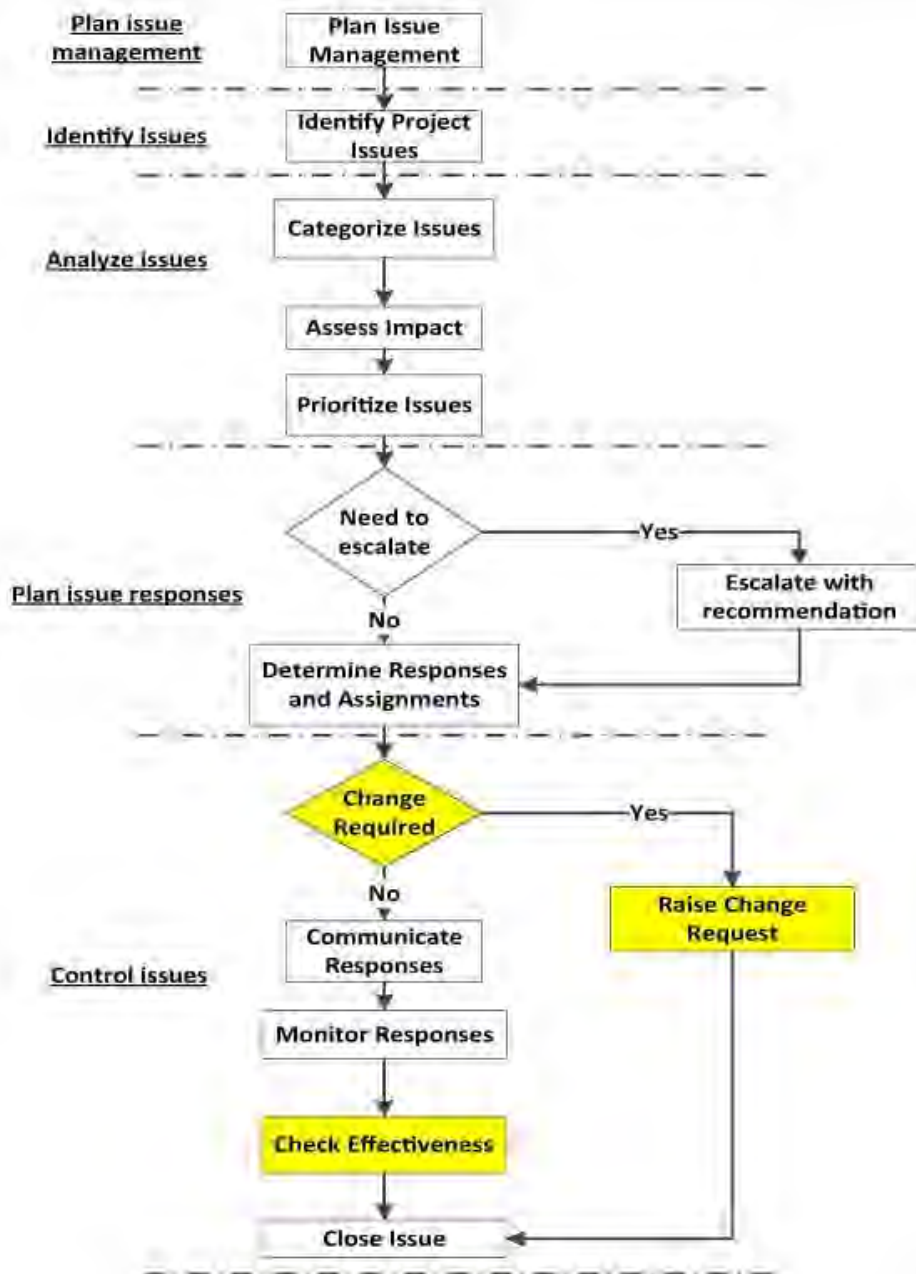
**Service Level Agreements**

Standard Metric of Support and Help - 24x7 Service provided  
 Time Allocation - 24x7x365 availability continuously monitored/managed  
 Availability - Service level responsible for support response and resolution  
**Critical incidents response:**  
 Type (1) Initial response during business hours  
 Type (2) Initial response 24x7x365  
 Critical incidents must be resolved during the agreed SLA  
**Standard Incident tickets:**  
 Type (1) Initial response during business hours  
 Type (2) Initial response 24x7x365  
 Standard incidents must be resolved during the agreed SLA

4. Provide corrective action regarding problems or issues that are identified and logged by the Public Agency.

In our experience, often in project environments, good news rises and bad news stays down at the working levels of the organization until it is too late. An effective issue resolution approach requires issues and problems to be worked first by the lowest appropriate level. If the issue cannot be resolved and closed, then it must be elevated to the next highest organizational level, and so on until the issue is closed. A formal process needs to be in place, similar to dispute clause in a contract or a grievance procedure in a labor contract, to escalate issues before they become fatal to the project cost or schedule. The following table and workflow depicts our time tested issue management resolution model we've used across organisations for handling day to day project issues.

MTX Issue Resolution Approach		
#	Step	Purpose
1	Plan issue management	Development of a plan showing the methodology of how to do each of the following steps
2	Identify issues	Determine the current issues facing the project using the different sources of information
3	Categorize issues	Classify issues according to their disciplines (Scope, Cost, Quality, Schedule, Resource, Communication)
4	Assess impact	Determine the impact of the issues on time and cost of the project
5	Prioritize (high – medium – low)	Prioritize issues according to their impact severity (high – medium – low)
6	Need to escalate?	A checking step for the team ability to handle issues or to escalate
7	Escalate with recommendation	If escalation is selected, it should be accompanied by specific recommendations
8	Determine response and responsibilities	To determine the required responses for each issue in addition to assigning responsibilities
9	Communicate responses	Communicate the tasks assigned to different team members to handle the issue and other stakeholders
10	Monitor responses	Control the implementation of planned actions
11	Close issues	A step of final closure and updating the relevant documents



For larger contract issues we adhere to the following guiding principles for effective issue resolution :

1. Developing realistic plans and schedules, maintaining their accuracy and dealing with delays and other 'claims' contemporaneously
2. Ensuring that the contract embodies a process to resolve issues at the lowest appropriate level
3. Ensuring process and procedural fairness at all times;
4. If necessary, escalate the issue to a more senior level and if need be, to the most senior level
5. Employing every endeavour to resolve issues by negotiation without involvement of lawyers
6. Using skilled facilitators to assist in resolving issues.
7. If formal dispute resolution is inevitable, selecting the most appropriate method to achieve an early, cheap and non-project disruptive solution.

5. Provide all product updates at no additional cost. Maintenance and upgrades must be scheduled and performed at a time with the least impact to the procurement processes of the Public Agency. Typical Public Agency hours are 8:00 a.m. through 5:00 p.m. CST.

Refer to this link for scheduled Maintenance. <https://help.salesforce.com/articleView?id=000331027&type=1>

2. Prospective Contractor(s) should provide descriptive information regarding additional features and abilities that their solution provides in addition to those requirements listed in Section 2.4 of the RFQ. Responses may include screen shots or other descriptive information.

Refer to our accelerator below for additional features

## Grants and Proposals

MTX Grants and Proposals is a robust end-to-end online grants management software powered by the Salesforce platform. Adaptable to suit multiple unique application processes, MTX Grants and Proposals enables organizations to create interactive online application forms; collect, manage, and review applications; and track application progress in real-time. With MTX Grants and Proposals, organizations of all sizes can manage the full lifecycle of their grant programs on a single, centralized platform.

### Key Features

- Build interactive application forms
- Salesforce integration to plug into CRM system
- Customize workflows with multiple application stages and requirements to suit unique grant program processes
- Manage lifecycle communications and alerts including award letters
- Secure review and evaluation platform accessible by multiple internal and external reviewers
- Automated reviewer assignment of applications
- Full lifecycle application management, scoring, and tracking
- Reports and dashboards



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3. Prospective Contractor(s) should provide descriptive information regarding what eProcurement or other ERP systems their solution can interface with. Provide information regarding the technical architecture of the interface, what software or other hardware is needed, etc.

Salesforce can integrate with its suite of product Financial force. Financial force is a native salesforce application and can be installed and configured as they reside on the same salesforce platform. Additional details

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003HoQQEA0>

### Complete Visibility from Procure-to-Pay

Eliminate communication barriers within the organization and effectively manage inventory. Whether providing available to promise inventory to the sales team or purchasing inventory for stock or directly related to an order for warehouse fulfillment or drop ship, FinancialForce Procurement delivers it all on the Salesforce platform.

### **Control Spend with Confidence & Automate Procurement Process**

Eliminate contract leakage by leveraging supplier agreements. Capture actual cost against a sale or project to understand profit margin. With FinancialForce, get a 360 ° view of your supplier's performance. Enforce spend policies with workflows and approvals.

### **Simplify Proposals & Contract Management**

FinancialForce provides the tools and information necessary to easily handle change and analyze the total contract value throughout the life of the contract.

### **Great Alone, Better Together**

This app is part of the FinancialForce ERP suite that includes Financial Management, Subscription & Usage billing, Revenue Recognition, and Professional Services Automation (PSA) - all unified on Salesforce.

## **E.5 Security, Implementation, and Contracting (5 Points)**

1. Prospective Contractor(s) should provide descriptive information regarding security protocols for the data center and software solution. Include discussion around intrusion detection, physical security, system monitoring, malware/virus protection, disaster recovery, etc.

Data centers are physically secured using a defense-in-depth approach. All buildings are completely anonymous, with bullet-resistant exterior walls and embassy-grade concrete posts and planters around the perimeter. All exterior entrances feature silent alarm systems that notify law enforcement in the event of suspicion or intrusion.

Physical access to the data centers and cages is monitored 24/7 by data center security personnel through guarded lobbies and CCTV cameras that are set up inside and outside the data centers in critical areas. Critical areas that are monitored include; doors to colocation areas, access to cage doors, server floor areas, external perimeter, data center entries and exits, and shipping/ receiving.

Salesforce controls visitor access (individuals without pre-authorized access) to the data center facilities by authenticating visitors before authorizing access to the facilities. All visitors must be accompanied by an individual on the Salesforce authorized data center access list. Unaccompanied visitors are not allowed access to the data center. Upon arrival visitors must sign in at the front desk, submit a valid government issued photo ID, and be approved by an individual on the Salesforce authorized list.

Access to Salesforce data centers is authorized based on position or role. Access is strictly limited to those few individuals with a business need for access. Access is controlled via badges/pin pads, biometrics, and security guards. Subsequent entry to the production cage areas and tape vault requires badge and biometric access. Access to the Salesforce data center cages requires two-factor authentication (a pin pad or badge and biometric access).

VESDA (very early smoke detection apparatus) sensors are installed throughout the data center and sampling points in the air handling systems. Dual-alarmed, dual-interlock, multi-zone, pre-action dry pipe water-based fire suppression limits response only to affected area(s). Smoke detectors are deployed at the ceiling level and under the raised floor throughout the collocated data center facilities. All fire suppression systems are inspected either in house by colocation data center staff or by OEM personnel according to manufacturer's



recommendations. Manually operated fire extinguishers are in place throughout the facility. Fire extinguishers are inspected monthly by data center staff and annually by a State-certified third-party service.

Audits of security controls at the data centers are performed multiple times throughout the year (SOC 1 [previously known as SAS70], ISO27001:2005, internal/technology audits). In addition, onsite data center engineers provide immediate feedback on security issues to the data center operations management and security teams. The data center locations are monitored during normal business hours by the data center engineers.

### **Ensuring Information is limited to only those employees who require access to perform services:**

Salesforce understands that the confidentiality, integrity, and availability of our customers' information are vital to their business operations and Salesforce's own success. Salesforce uses a multi-layered approach to protect that key information, constantly monitoring and improving our application, systems, and processes to meet the growing demands and challenges of security.

Independent audits confirm that our security goes far beyond what most companies have been able to achieve on their own. Using the latest firewall protection, intrusion detection systems, and TLS encryption, Salesforce gives you the peace of mind only a world-class security infrastructure can provide.

### **Third-party validation**

Security is a multidimensional business imperative that demands consideration at multiple levels, from security for applications to physical facilities and network security. In addition to the latest technologies, world-class security requires ongoing adherence to best-practice policies. To ensure this adherence, we continually seek relevant third-party certification, including ISO 27001, the SysTrust audit (the recognized standard for system security), and SSAE 16 SOC 1 audit (an examination and assessment of internal corporate controls, previously known as SAS 70 Type II). SOC1, SOC2 and SOC3 audits are performed by third party auditor annually at a minimum. Additional audits and certifications include: CSA 'Consensus Assessments Initiative', JIPDC (Japan Privacy Seal), Tuv (Germany Privacy Mark), and TRUSTe.

### **Protection at the application level**

Salesforce protects customer data by ensuring that only authorized users can access it. Administrators assign data security rules that determine which data users can access. Sharing models define organization-wide defaults and data access based on a role hierarchy. All data is encrypted in transfer. All access is governed by strict password security policies. All passwords are stored in SHA 256 one-way hash format. Applications are continually monitored for security violation attempts.

### **Protection at the facilities level**

Salesforce security standards are stringent and designed with demanding customers in mind, including the world's most security-conscious financial institutions. Authorized personnel must pass through five levels of biometric scanning to reach the Salesforce system cages. All buildings are completely anonymous, with bullet-resistant exterior walls and embassy-grade concrete posts and planters around the perimeter. All exterior entrances feature silent alarm systems that notify law enforcement in the event of suspicion or intrusion. Data is backed up to disk or tape. These backups provide a second level of physical protection. Neither disks nor tapes ever leave the data center.

### **Protection at the network level**

Multilevel security products from leading security vendors and proven security practices ensure network security. To prevent malicious attacks through unmonitored ports, external firewalls allow only http and https traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard, and address translation technologies further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication, along with the extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you'll find:

- Live and historical data on system performance
- Up-to-the minute information on planned maintenance
- Phishing, malicious software, and social engineering threats
- Best security practices for your organization
- Information on how we safeguard your data

To prevent malicious attacks through unmonitored ports, external firewalls allow only http and https traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard, and address translation technologies further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication, along with the

extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Salesforce employs a number of sophisticated security tools that monitor platform activity in real time to expose many types of malicious events, threats, and intrusion attempts. For example, state-of-the-art intrusion detection systems (IDSs) detect some common types of external attacks. Salesforce also monitors application and database activity and uses event management tools that actively correlate user actions and event data and then call attention to potential internal and external threats.

2. Prospective Contractor(s) should provide detailed information regarding the implementation process that would be utilized for any contracted Public Agency. Sample work plans and other descriptive information may be provided

Refer section **g. Implementation, Q#1** above for the detailed implementation process

3. Prospective Contractor(s) should provide detailed information regarding the contracting process that would be utilized with a Public Agency. Please provide sample SOW's and other related documentation (i.e. SLA's, Terms and Conditions, Sample Agreements, etc.).

The following is an image from MTX's Statement of Work template

**Milestones and Deliverables:**

Payments will be made based on the following schedule:

Milestone	Deliverables	%	Amount
Execution of SOW	1. Signed SOW	40%	
Completion of Development / Start of UAT	1. Updated User Stories & Requirements 2. Updated Data Model Dictionary	40%	
Completion of Project	1. System Design Document 2. User Manual Guide	20%	
<b>Total</b>		<b>100%</b>	

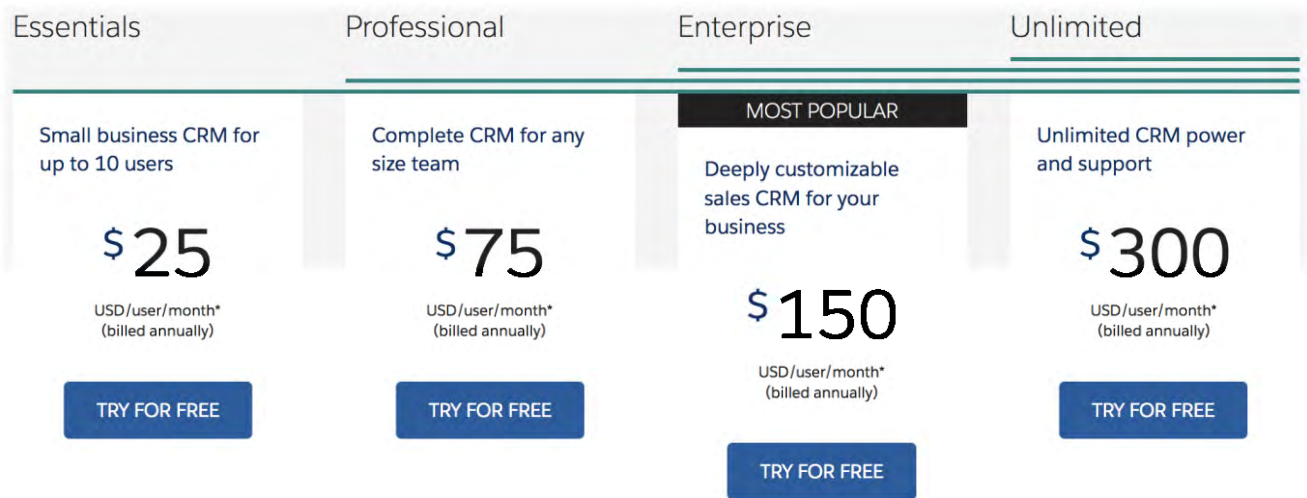


**E.6 Fee Structure (5 Points)**

1. Prospective Contractor(s) should provide detailed information regarding the fee structure for use of the solution. Please provide any fees that would be charged to vendors and/or a Public Agency (i.e. vendor registration fees, bid viewing fees, contract award fees, Public Agency annual fees, etc). If the Prospective Contractor offers multiple fee structures, please provide information regarding all options.

MTX's Implementation Costs must be discussed further with the State of Arkansas.

Please see the chart below for **Salesforce's** fee structure.



# Salesforce Lightning App Builder

## Voluntary Product Accessibility Template<sup>®</sup> (VPAT) | April 2018

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This Voluntary Product Accessibility Template, or VPAT, is a tool that helps officials and decision-makers to evaluate Lightning App Builder design conformance with the accessibility standards under Section 508 of the Rehabilitation Act.

The scope of this VPAT includes all features of the **Salesforce Lightning App Builder**. Lightning App Builder features includes **Lightning App Builder View, New Page, Open Page, Activation, App Manager, New Lightning App and Builder Take a tour**. Salesforce Lightning Experience and Service Cloud features are captured in the different VPAT. For more information, please visit Salesforce Product Accessibility Status at [https://www.salesforce.com/company/legal/508\\_accessibility/](https://www.salesforce.com/company/legal/508_accessibility/).

**Vendor:** Salesforce

**Name of the Product:** Lightning App Builder

**Version:** Summer 2018

**Point of Contact Name/Email:** accessibility@salesforce.com

The first table of the VPAT document provides a summary view of the section 508 Standards. The subsequent tables provide more detailed views of each subsection. There are three columns in each table. Column one of the Summary Table describes the subsections of subparts B and C of the Standards.

### Summary Table

Criteria	Applicable	Compliance
Section 1194.21 Software Applications and Operating Systems	Applicable	Supports with exceptions
Section 1194.22 Web-based internet information and applications	Applicable	Supports with exceptions
Section 1194.23 Telecommunications Products	Not Applicable	—
Section 1194.24 Video and Multi-media Products	Not Applicable	—
Section 1194.25 Self-Contained, Closed Products	Not Applicable	—
Section 1194.26 Desktop and Portable Computers	Not Applicable	—
Section 1194.31 Functional Performance Criteria	Applicable	Supports with exceptions
Section 1194.41 Information, Documentation, and Support	Applicable	Supports through equivalent facilitation

## Section 1194.21 Software Applications and Operating Systems — Detail

Criteria	Supporting Features	Remarks and Explanations
(a) When software is designed to run on a system that has a keyboard, product functions shall be executable from a keyboard where the function itself or the result of performing a function can be discerned textually.	Supports with exceptions	<p>Most of the core features and controls in the Lightning App Builder user interface are reachable using the keyboard alone. They may be executed using the Tab key and other keys, as required by the criteria. However, there are some exceptions to this, including the following:</p> <ul style="list-style-type: none"> <li>• The “Clear” search icon displayed in the App Manager Select Items and Assign to User Profiles” filter search box is not keyboard accessible whenever search is performed to filter the list and tab to the list element.</li> </ul>
(b) Applications shall not disrupt or disable activated features of other products that are identified as accessibility features, where those features are developed and documented according to industry standards. Applications also shall not disrupt or disable activated features of any operating system that are identified as accessibility features where the application programming interface for those accessibility features has been documented by the manufacturer of the operating system and is available to the product developer.	Supports	Lightning App Builder user interface and controls do not disrupt, deactivate, or interfere with the accessibility features of the Windows operating system such as filter keys, toggle keys or sticky keys.
(c) A well-defined on-screen indication of the current focus shall be provided that moves among interactive interface elements as the input focus changes. The focus shall be programmatically exposed so that Assistive Technology can track focus and focus changes.	Supports	The Lightning App Builder user interface provides a clear visual on-screen indication of current focus for all the interactive interface elements.
(d) Sufficient information about a user interface element including the identity, operation and state of the element shall be available to Assistive Technology. When an image represents a program element, the information conveyed by the image must also be available in text.	Supports	Lightning App Builder user interface and interactive elements uses standard HTML and WAI-ARIA attributes to describe the identity, operation, and state of the user interface elements to assistive technologies.
(e) When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images shall be consistent throughout an application's performance.	Supports	Images that support programmatic elements are used consistently within the Lightning App Builder user interface to represent certain functions or identify interactive controls.
(f) Textual information shall be provided through operating system functions for displaying text. The minimum information that shall be made available is text content, text input caret location, and text attributes.	Supports	Textual information is available to Assistive Technology in Lightning App Builder.
(g) Applications shall not override user selected contrast and color selections and other individual display attributes.	Supports	Lightning App Builder user interface and controls remains visible in Windows operating system High Contrast mode and does not override any default contrast settings.

Criteria	Supporting Features	Remarks and Explanations
(h) When animation is displayed, the information shall be displayable in at least one non-animated presentation mode at the option of the user.	Not Applicable	Lightning App Builder does not use any animation in the user interface.
(i) Color coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.	Supports	Lightning App Builder user interface does not use color alone as a means of conveying information.
(j) When a product permits a user to adjust color and contrast settings, a variety of color selections capable of producing a range of contrast levels shall be provided.	Not Applicable	Lightning App Builder does not permit a user to adjust color and contrast settings in the user interface.
(k) Software shall not use flashing or blinking text, objects, or other elements having a flash or blink frequency greater than 2 Hz and lower than 55 Hz.	Supports	Lightning App Builder has no flashing or blinking text, objects or other elements greater than 2Hz and lower than 55Hz.
(l) When electronic forms are used, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.	Supports with exceptions	<p>Most of the electronic form controls including input and buttons in the Lightning App Builder user interface can be operated and accessible by using assistive technology. The form label elements within the Health Cloud pages are properly associated and placed in-line for the form fields with the following exception:</p> <ul style="list-style-type: none"> <li>• The “Subtabs of” drop down menu available within “App Manager - Navigation Items” page are not properly associated with any form label.</li> </ul>

## Section 1194.22 Web-based Internet information and applications – Detail

Criteria	Supporting Features	Remarks and Explanations
(a) A text equivalent for every non-text element shall be provided (e.g., via "alt", "longdesc", or in element content).	Supports	The images displayed in the Lightning App Builder user interface have meaningful alternative (alt) text descriptions. Non-relevant or decorative images have null alt attributes or are inserted as a background image. Form buttons controls have descriptive values and form inputs have proper text labels.
(b) Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.	Does not apply	Lightning App Builder does not contain any videos or multimedia presentations.
(c) Web pages shall be designed so that all information conveyed with color is also available without color, for example from context or markup.	Supports with exceptions	<p>Lightning App Builder does not use color alone to distinguish the importance of a visual element. Menus and tabs use highlighting to indicate current location. This information is also communicated by WAI-ARIA role and selected state.</p> <p>Sufficient color contrast is provided for most of the elements between foreground and background text colors for easy and clear legibility for people with moderately low vision in Lightning App Builder user interface and controls with the following exceptions:</p> <ul style="list-style-type: none"> <li>• The color contrast failed the minimum requirement for the blue text within “Section” panel whenever focus is set on the individual panel using keyboard tabbing or mouse over.</li> <li>• The grey and blue links foreground text over grey background within “How the highlights panel work, Path Setup, and Record Details/Related List Quick Links” modal window and Select Items” page fails the minimum color contrast requirement.</li> <li>• “Instructions Text” grey foreground text over white background within all App Manager pages such as “Add Details and Branding, Utility Bar, Select Items, Navigation Items, Assign User to Profiles” page failed the minimum requirement for the color contrast.</li> </ul>
(d) Documents shall be organized so they are readable without requiring an associated style sheet.	Not Applicable	Lightning App Builder is a web-based application (not a document). To work correctly, its user interface requires the use of associated style sheets. Some hidden elements become visible, and some forms do not fully comply whenever style sheets are not associated.
(e) Redundant text links shall be provided for each active region of a server-side image map.	Not Applicable	Lightning App Builder does not use server-side image maps.

Criteria	Supporting Features	Remarks and Explanations
(f) Client-side image maps shall be provided instead of server-side image maps except where the regions cannot be defined with an available geometric shape.	Not Applicable	Lightning App Builder does not use client-side image maps.
(g) Row and column headers shall be identified for data tables.	Supports with exceptions	Data tables with column and/or row headers are properly identified (using the <th> element and scope attributes) within Lightning App Builder, with the following exceptions: <ul style="list-style-type: none"> <li>• The first “Checkbox” column table header cells in the data list views within “Open Page, Select Apps, Select Record Types, Selected Profiles, Remove App Default Assignments and Care Gaps” pages are left blank and no information is provided for the Assistive Technology users.</li> </ul>
(h) Markup shall be used to associate data cells and header cells for data tables that have two or more logical levels of row or column headers.	Not Applicable	Currently, there are no pages or screens within the Lightning App Builder core functionality and features that contain data tables with more than one logical level of either column or row headers.
(i) Frames shall be titled with text that facilitates frame identification and navigation	Supports	The iframes used for interaction within Lightning App Builder core functionality are provided with proper title information.
(j) Pages shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.	Supports	Lightning App Builder does not cause the screen to flicker with a frequency greater than 2Hz and lower than 55Hz.
(k) A text-only page, with equivalent information or functionality, shall be provided to make a web site comply with the provisions of this part, when compliance cannot be accomplished in any other way. The content of the text-only page shall be updated whenever the primary page changes.	Not Applicable	Text-only pages are not required because the Lightning App Builder user interface has been coded to meet applicable standards, to the extent specified.  Refer to the following sections for more details regarding exceptions: 1194.21 (a), 1194.21 (i), 1994.22 (c), 1994.22 (g), 1194.22 (n)
(l) When pages utilize scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by Assistive Technology.	Supports	Lightning App Builder uses JavaScript, WAI-ARIA and the most modern HTML5 techniques to provide feedback from interactive elements. This allows Assistive Technology such as screen readers to read and transmit information back to the user.
(m) When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet that complies with §1194.21(a) through (l).	Supports	Lightning App Builder does not require any applet or plug-in to work with its default functionality.

Criteria	Supporting Features	Remarks and Explanations
(n) When electronic forms are designed to be completed on-line, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.	Supports with exceptions	<p>Most of the electronic form controls including input and buttons in the Lightning App Builder user interface can be operated and accessible by using assistive technology. The form label elements within the Health Cloud pages are properly associated and placed in-line for the form fields with the following exception:</p> <ul style="list-style-type: none"> <li>• The “Subtabs of” drop down menu available within “App Manager - Navigation Items” page are not properly associated with any form label.</li> </ul>
(o) A method shall be provided that permits users to skip repetitive navigation links.	Supports	Lightning App Builder pages does not contain any “Skip to navigation” link at the top of every page to bypass top navigation but keyboard users are provided with different keystrokes such as “F6” to navigate between different sections of the page more efficiently. The pages are also provided with headings and ARIA landmarks to aid with rapid navigation to desired content.
(p) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.	Supports	Users are alerted within Lightning App Builder with time response modal window and provided options to select additional time for continuing the login session.



## Section 1194.24 Video and Multimedia Products – Detail

Criteria	Supporting Features	Remarks and Explanations
(c) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain speech or other audio information necessary for the comprehension of the content, shall be open or closed captioned.	Not Applicable	Lightning App Builder does not contain any training, informational video and multimedia productions.
(d) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain visual information necessary for the comprehension of the content, shall be audio described.	Not Applicable	Lightning App Builder does not contain any training, informational video and multimedia productions.
(e) Display or presentation of alternate text presentation or audio descriptions shall be user-selectable unless permanent.	Not Applicable	Lightning App Builder does not contain any training, informational video and multimedia productions.

## Section 1194.31 Functional Performance Criteria – Detail

Criteria	Supporting Features	Remarks and Explanations
(a) At least one mode of operation and information retrieval that does not require user vision shall be provided, or support for Assistive Technology used by people who are blind or visually impaired shall be provided.	Supports with exceptions	<p>Most of the core features and controls in the Lightning App Builder user interface are reachable using the keyboard alone. They may be executed using the Tab key and other keys, as required by the criteria. However, there are some exceptions to this, including the following:</p> <ul style="list-style-type: none"> <li>• The “Close”, “Draggable” and “Eye” image icon links elements displayed on the center individual frames does not contains any assistive value for the screen readers to announce.</li> <li>• The remove links elements displayed on the “Section” panel for the Accordion/Tab components does not have any assistive value for the screen readers to announce.</li> <li>• The object list items displayed within “App Manager - Available and Selected” lists are not announced properly by screen readers whenever they are navigated using “Up and Down” arrow keystrokes. Once the focus is set on the list item, the screen reader does not announce the list item and goes blank.</li> <li>• The “Clear” search icon displayed in the App Manager Select Items and Assign to User Profiles” filter search box is not keyboard accessible whenever search is performed to filter the list and tab to the list element.</li> </ul> <p>Refer to the following sections for more details regarding exceptions: 1194.21 (a), 1194.21 (i), 1994.22 (c), 1994.22 (g), 1194.22 (n)</p>
(b) At least one mode of operation and information retrieval that does not require visual acuity greater than 20/70 shall be provided in audio and enlarged print output working together or independently, or support for Assistive Technology used by people who are visually impaired shall be provided.	Supports	Lightning App Builder supports screen magnification and browser-provided zoom functionality.
(c) At least one mode of operation and information retrieval that does not require user hearing shall be provided, or support for Assistive Technology used by people who are deaf or hard of hearing shall be provided.	Supports	Lightning App Builder does not rely on sound alone or user hearing to access any of its core functionality.
(d) Where audio information is important for the use of a product, at least one mode of operation and information retrieval shall be provided in an enhanced auditory fashion, or support for assistive hearing devices shall be provided.	Supports	Lightning App Builder does not rely on audio to present information.

Criteria	Supporting Features	Remarks and Explanations
(e) At least one mode of operation and information retrieval that does not require user speech shall be provided, or support for Assistive Technology used by people with disabilities shall be provided.	Supports	Lightning App Builder does not require user speech.
(f) At least one mode of operation and information retrieval that does not require fine motor control or simultaneous actions and that is operable with limited reach and strength shall be provided.	Supports	Lightning App Builder does not require fine motor control or simultaneous actions. Lightning Experience user interface and controls have large target areas that would not cause problems for people with fine motor control or limited reach and strength.

## Section 1194.41 Information, Documentation and Support – Detail

Criteria	Supporting Features	Remarks and Explanations
(a) Product support documentation provided to end-users shall be made available in alternate formats upon request, at no additional charge	Supports	Salesforce provides electronic versions of all product support documentation related to Lightning App Builder. End-users with disabilities can request additional product support documentation by opening a new case at <a href="http://help.salesforce.com">http://help.salesforce.com</a> .
(b) End-users shall have access to a description of the accessibility and compatibility features of products in alternate formats or alternate methods upon request, at no additional charge.	Supports	Salesforce provides information on Lightning App Builder user interface accessibility features in the documentation. End-users with disabilities can open support request directly at <a href="http://help.salesforce.com">http://help.salesforce.com</a> .
(c) Support services for products shall accommodate the communication needs of end-users with disabilities.	Supports with equivalent facilitation	Support service related to Lightning App Builder can be found at Salesforce.com website. Currently, telephone communication provision does not support TTY or relay services. Users with disabilities can open support request directly at <a href="http://help.salesforce.com">http://help.salesforce.com</a> .

# PROPOSED SUBCONTRACTORS FORM

- **Do not** include additional information relating to subcontractors on this form or as an attachment to this form.

**PROSPECTIVE CONTRACTOR PROPOSES TO USE THE FOLLOWING SUBCONTRACTOR(S) TO PROVIDE SERVICES.**

*Type or Print the following information*

Subcontractor's Company Name	Street Address	City, State, ZIP

**PROSPECTIVE CONTRACTOR DOES NOT PROPOSE TO USE SUBCONTRACTORS TO PERFORM SERVICES.**

**Equal Opportunity Policy**

- A. In compliance with Arkansas Code Annotated § 19-11-104, OSP must have a copy of the anticipated Contractor's Equal Opportunity (EO) Policy prior to issuing a QVL list.
- B. EO Policies should be included as a hardcopy accompanying the solicitation response.
- C. Contractors are responsible for providing updates or changes to their respective policies, and for supplying EO Policies upon request to other Public Agencies that must also comply with this statute.
- D. Prospective Contractors who are not required by law to have an EO Policy must submit a written statement to that effect.

## **MTX Group Diversity Policy**

MTX Group, Inc is committed to fostering, cultivating and preserving a culture of diversity and inclusion.

Our human capital is the most valuable asset we have. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities and talent that our employees invest in their work represents a significant part of not only our culture, but our reputation and company's achievement as well.

We embrace and encourage our employees' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique.

MTX Group, Inc diversity initiatives are applicable—but not limited—to our practices and policies on recruitment and selection; compensation and benefits; professional development and training; promotions; transfers; social and recreational programs; layoffs; terminations; and the ongoing development of a work environment built on the premise of gender and diversity equity that encourages and enforces:

- Respectful communication and cooperation between all employees.
- Teamwork and employee participation, permitting the representation of all groups and employee perspectives.
- Work/life balance through flexible work schedules to accommodate employees' varying needs.
- Employer and employee contributions to the communities we serve to promote a greater understanding and respect for our diversity.
- All employees of MTX Group, Inc have a responsibility to treat others with dignity and respect at all times. All employees are expected to exhibit conduct that reflects inclusion during work, at work functions on or off the work site, and at all other company-sponsored and participative events. All employees are also required to attend and complete annual diversity awareness training to enhance their knowledge to fulfill this responsibility.

Any employee found to have exhibited any inappropriate conduct or behavior against others may be subject to disciplinary action.

Employees who believe they have been subjected to any kind of discrimination that conflicts with the company's diversity policy and initiatives should seek assistance from a supervisor or an HR representative.





## **Voluntary Product Accessibility Template (VPAT).**

Accordingly, the Prospective Contractor expressly represents and warrants to the State of Arkansas through the procurement process by submission of a Voluntary Product Accessibility Template (VPAT) for 36 C.F.R. § 1194.21, as it existed on January 1, 2013 (software applications and operating ICSs) and 36 C.F.R. § 1194.22, that the technology provided to the State for purchase is capable, either by virtue of features included within the technology, or because it is readily adaptable by use with other technology, of:

1. Providing, to the extent required by Arkansas Code Annotated § 25-26-201 et seq., as amended by Act 308 of 2013, equivalent access for effective use by both visual and non-visual means.
2. Presenting information, including prompts used for interactive communications, in formats intended for non-visual use.
3. After being made accessible, integrating into networks for obtaining, retrieving, and disseminating information used by individuals who are not blind or visually impaired.
4. Providing effective, interactive control and use of the technology, including without limitation the operating system, software applications, and format of the data presented is readily achievable by nonvisual means.
5. Being compatible with information technology used by other individuals with whom the blind or visually impaired individuals interact.
6. Integrating into networks used to share communications among employees, program participants, and the public.
7. Providing the capability of equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.



## CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM

Failure to complete all of the following information may result in a delay in obtaining a contract, lease, purchase agreement, or grant award with any Arkansas State Agency.

SUBCONTRACTOR: \_\_\_\_\_ SUBCONTRACTOR NAME: \_\_\_\_\_

Yes  No

TAXPAYER ID NAME: MTX Group Inc IS THIS FOR:  
 Goods?  Services?  Both?

YOUR LAST NAME: Gautsche FIRST NAME: Jeff M.I.:

ADDRESS: 1450 Western Ave

CITY: Albany STATE: NY ZIP CODE: 12205 COUNTRY: United States

**AS A CONDITION OF OBTAINING, EXTENDING, AMENDING, OR RENEWING A CONTRACT, LEASE, PURCHASE AGREEMENT, OR GRANT AWARD WITH ANY ARKANSAS STATE AGENCY, THE FOLLOWING INFORMATION MUST BE DISCLOSED:**

### FOR INDIVIDUALS \*

Indicate below if: you, your spouse or the brother, sister, parent, or child of you or your spouse is a current or former: member of the General Assembly, Constitutional Officer, State Board or Commission Member, or State Employee:

Position Held	Mark (√)		Name of Position of Job Held <small>[senator, representative, name of board/ commission, data entry, etc.]</small>	For How Long?		What is the person(s) name and how are they related to you? <small>[i.e., Jane Q. Public, spouse, John Q. Public, Jr., child, etc.]</small>	
	Current	Former		From MM/YY	To MM/YY	Person's Name(s)	Relation
General Assembly							
Constitutional Officer							
State Board or Commission Member							
State Employee							

None of the above applies

### FOR AN ENTITY (BUSINESS) \*

Indicate below if any of the following persons, current or former, hold any position of control or hold any ownership interest of 10% or greater in the entity: member of the General Assembly, Constitutional Officer, State Board or Commission Member, State Employee, or the spouse, brother, sister, parent, or child of a member of the General Assembly, Constitutional Officer, State Board or Commission Member, or State Employee. Position of control means the power to direct the purchasing policies or influence the management of the entity.

Position Held	Mark (√)		Name of Position of Job Held <small>[senator, representative, name of board/commission, data entry, etc.]</small>	For How Long?		What is the person(s) name and what is his/her % of ownership interest and/or what is his/her position of control?		
	Current	Former		From MM/YY	To MM/YY	Person's Name(s)	Ownership Interest (%)	Position of Control
General Assembly								
Constitutional Officer								
State Board or Commission Member								
State Employee								

None of the above applies



## Contract and Grant Disclosure and Certification Form

Failure to make any disclosure required by Governor's Executive Order 98-04, or any violation of any rule, regulation, or policy adopted pursuant to that Order, shall be a material breach of the terms of this contract. Any contractor, whether an individual or entity, who fails to make the required disclosure or who violates any rule, regulation, or policy shall be subject to all legal remedies available to the agency.

As an additional condition of obtaining, extending, amending, or renewing a contract with a state agency I agree as follows:

1. Prior to entering into any agreement with any subcontractor, prior or subsequent to the contract date, I will require the subcontractor to complete a **CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM**. Subcontractor shall mean any person or entity with whom I enter an agreement whereby I assign or otherwise delegate to the person or entity, for consideration, all, or any part, of the performance required of me under the terms of my contract with the state agency.

2. I will include the following language as a part of any agreement with a subcontractor:

*Failure to make any disclosure required by Governor's Executive Order 98-04, or any violation of any rule, regulation, or policy adopted pursuant to that Order, shall be a material breach of the terms of this subcontract. The party who fails to make the required disclosure or who violates any rule, regulation, or policy shall be subject to all legal remedies available to the contractor.*

3. No later than ten (10) days after entering into any agreement with a subcontractor, whether prior or subsequent to the contract date, I will mail a copy of the **CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM** completed by the subcontractor and a statement containing the dollar amount of the subcontract to the state agency.

I certify under penalty of perjury, to the best of my knowledge and belief, all of the above information is true and correct and that I agree to the subcontractor disclosure conditions stated herein.

Signature  Title General Counsel Date 6/20/2019

Vendor Contact Person Jeff Gautsche Title General Counsel Phone No. (516) 361-9681

Agency use only

Agency Number \_\_\_\_\_ Agency Name \_\_\_\_\_ Agency Contact Person \_\_\_\_\_ Contact Phone No. \_\_\_\_\_ Contract or Grant No. \_\_\_\_\_