

STATEMENT OF WORK

City of Dickinson, ND

PREPARED FOR

City of Dickinson, ND

Enterprise Resource Planning (ERP) Solutions Financial Management (General Ledger, Accounts Payable, Requisitions, Cash Receipts, Bank Reconciliation, Accounts Receivable, Purchase Cards, Fixed Assets, Budgeting & Performance, Financial Reporting), Human Capital Management, Utility Billing, Payroll

Permitting & Licensing Solutions: Building Permits & Inspections, Planning & Zoning Approvals, Code Enforcement, Business Licensing, Public Works Permits

Enterprise Asset Management Solutions Water Distribution, Transportation, Walkability, Signals, Stormwater, Parks and Recreation, Facilities, Wastewater Collection / Sanitary Sewer, Water Distribution, Wastewater Treatment Plant

Government App Builder 311 Request Management

PREPARED BY

OpenGov, Inc.

Professional Services

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1. Project Summary

1.1 Project Scope and Understanding

This Statement of Work ("SOW") outlines the Professional Services OpenGov will provide to City of Dickinson, ND ("Customer") under the applicable Order Form. Professional Services or technical requirements not explicitly listed in this SOW are considered out of scope. Any changes to scope will follow the Change Order procedures defined in [Section 1.7 Modifications](#).

1.2 Exhibits

The following exhibits are incorporated by reference and are part of this SOW:

- [Exhibit 1: Implementation Activities](#)
- [Exhibit 2: Technical Requirements](#)

1.3 OpenGov Responsibilities

OpenGov will provide a framework for planning, communication, progress tracking, and coordination for activities in Exhibit 1. In collaboration with Customer, OpenGov will develop and maintain the Project Plan. The "Project Plan" is a detailed, living document that defines how the project will be executed, including tasks, timelines, milestones, and team assignments. OpenGov will monitor progress against the Project Plan, coordinate adjustments to tasks and schedules as needed, and conduct status meetings as agreed to by the parties. OpenGov will provide weekly status reports, a Project Charter, and a RAID register (Risks, Actions, Issues, and Decisions). The "Project Charter" is a high-level document outlining the project's purpose, goals, key stakeholders, success criteria, and major milestones.

1.4 Customer Responsibilities

The Customer will appoint a primary point of contact with authority to make binding decisions ("Customer's Project Manager"). This person will coordinate internal resources, assign subject matter experts ("SMEs"), and oversee implementation. Responsibilities include attending status meetings, making timely decisions, providing requested information, escalating issues internally, and collaborating on the Project Plan and Change Order process, if applicable.

Customer acknowledges that the success of this project is contingent on its full participation. Customer must provide data within ten (10) business days of the project kick off meeting, and as requested throughout the project, maintain consistent data formats and access throughout the project, and allocate the necessary Customer resources and time to support deliverables and meet agreed-upon timelines.

Any failure by Customer to meet its responsibilities under this SOW (each, a “Customer Delay”) will automatically suspend the affected obligations of OpenGov for the duration of the Customer Delay and for a reasonable restart period thereafter. All affected milestones, delivery dates, and service-level commitments will be extended on a day-for-day basis (or as otherwise reasonably necessary) to account for the Customer Delay, and may result in an adjustment of the fees if OpenGov incurs additional time, materials, or other costs as a result. Under no circumstances will any consequence of a Customer Delay constitute a breach by OpenGov of this SOW or of the Agreement, nor will OpenGov be liable for any failure to meet a performance obligation that is caused, in whole or in part, by a Customer Delay.

As part of this project, the Customer is responsible for testing all applicable workflows, automations, integrations, and configurations as part of this Statement of Work.

1.5 Estimated Schedule

The estimated project duration by phase is provided in [Exhibit 1: Implementation Activities](#). The specific timeline, including order of delivery of the product(s), will be determined during the project planning activities in the Initiate Phase.

Services are estimated to begin within two (2) weeks and no later than four (4) weeks from contract signature. OpenGov reserves the right to adjust the schedule based on the availability of Customer or OpenGov resources, and the timeliness of deliverables provided by the Customer.

1.6 Acceptance Procedure

OpenGov will submit completed deliverables to the Customer’s Project Manager for review. Within five (5) business days of receipt, the Customer’s Project Manager will either provide written acceptance or a list of requested revisions. In the event there are requested revisions, the subsequent review period for acceptance will follow the same timeline until final acceptance. If Customer does not respond within this period, the deliverable will be deemed accepted. Once a deliverable is accepted, any requested changes will require a paid Change Order as outlined in [Section 1.7 Modifications](#).

Acceptance milestones and review timelines will be tracked in the Project Plan. Both parties acknowledge that delays in task completion or unresolved issues may impact the project timeline. If OpenGov determines in good faith that Customer is not fulfilling its responsibilities under this SOW, OpenGov may place services on hold following a minimum of five (5) business days’ written notice. The notice will specify the actions needed to progress the project. During the hold period, OpenGov may reallocate resources without penalty and will not be responsible for resulting delays.

1.7 Modifications

The fees and estimated timeline are based on the scope and assumptions in this SOW. If either party determines that a change to the scope is necessary, the parties will collaborate to define the required modification, which may result in fee adjustments based on OpenGov's standard rates. All modifications must be documented in a written Change Order and signed by both parties ("Change Order"). Examples of changes include revisions to the project timeline, deliverables, or resource allocation.

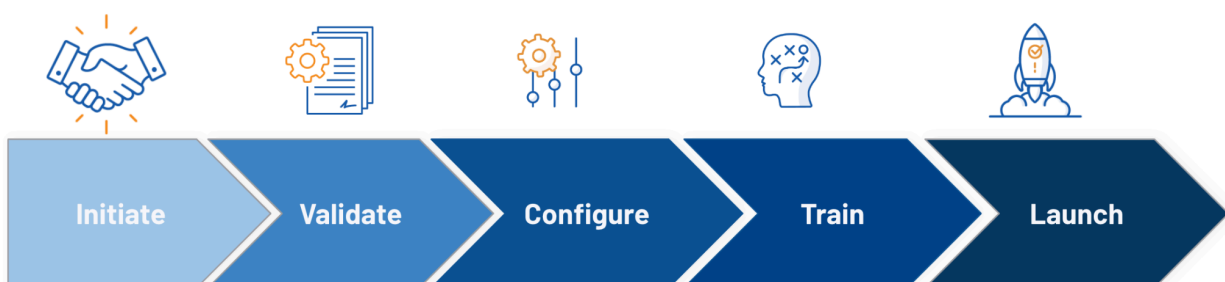
1.8 Communication and Escalation Procedure

OpenGov and Customer agree to maintain regular communication in alignment with the Project Plan to ensure progress, resolve questions promptly, and minimize risk. Both parties will raise any issues or concerns in a timely manner. If challenges are not resolved through standard project discussions, Customer and OpenGov Project Managers will escalate to their respective executive leadership teams to jointly determine a resolution and align on a path to successful implementation.

2. Implementation Methodology

2.1 Implementation Methodology

Each implementation is structured around these phases. Deliverables, sign-offs, and completion criteria are aligned to the relevant phase. The specific timeline, including order of delivery of the product(s), will be determined during the project planning activities in the Initiate Phase.



Phase	Activities	Completion Criteria
Initiate	OpenGov provisions access and performs initial system set	• Project Plan delivered • Project Charter delivered
Validate	OpenGov works with the Customer to confirm requirements and review initial configurations.	• Validation Workshops completed • Solution Blueprint drafted
Configure	OpenGov completes system configuration as outlined in this SOW.	• Configuration Sign off
Train	OpenGov provides training to system administrators and/or end users, as applicable.	• Training plan executed • User Acceptance Testing completed
Launch	OpenGov provides post-go-live support and transitions the Customer to OpenGov's Customer Success Team.	• Go-Live completed • Customer Success hand-off • Project Closure

2.2 Delivery Model

OpenGov will perform services under this SOW in a hybrid delivery model combining remote and onsite services. For onsite services, customers must provide a suitable workspace, including a conference room with attendee capacity, non-public wi-fi, and AV equipment.

Product	Onsite Services In Scope	Not to Exceed Travel Expenses
Enterprise Resource Planning (ERP) Financial Management	Three (3) Onsites	\$14,400
Utility Billing	One (1) Onsite	\$2,400
Human Capital Management	Zero (0) Onsites	\$0
Enterprise Asset Management	Two (2)	\$5,600

OpenGov may use a combination of OpenGov personnel and OpenGov-trained implementation partners to deliver the services described in this SOW.

Exhibit 1: Implementation Activities

Enterprise Resource Planning (ERP)

Use Cases

The following ERP use cases provides a high-level overview of how this solution is intended to be used:

- Financial Management (General Ledger, Accounts Payable, Requisitions, Cash Receipts, Bank Reconciliation, Accounts Receivable, Purchase Cards, Fixed Assets, Budgeting & Performance, Financial Reporting), Human Capital Management, Utility Billing, Payroll

Estimated Project Duration

The estimated duration of this ERP project is 6-18 months including the following assumptions:

- Initiate: 2-4 weeks
- Validate: 3-10 weeks
- Configure: 4-16 Weeks
- Train: 4-10 Weeks
- Launch: 4-8 Weeks

Implementation Requirements and Configuration

The following Implementation Requirements and Configuration section of the SOW provides a description of how the solution will be configured by OpenGov. Any items listed as “no” are outside of the scope of this implementation.

Financial Management Advanced Professional Services Package			
Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: - Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. - Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes	Customer will: - Identify functional business owners and SMEs to attend. - Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. - Review and confirm the Project Plan and Project Charter.

			Completion Criteria: - Customer sign-off on the receipt of the Project Plan and Project Charter. - Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshops	OpenGov will: - Conduct a two-day onsite validation workshop focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during workshops, to guide the Configure Phase.	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. - Review the Solution Blueprint Completion Criteria: - Completion of the Validation Workshops.
Chart of Accounts	OpenGov will: - Configure Chart of Account settings. - Create the Chart of Accounts format in Excel prior to upload into the application. - Provide up to twelve (12) hours of working sessions on Chart of Accounts. - Review the final Chart of Accounts with the Customer before upload. - Perform one (1) upload of the final Chart of Accounts into the application.	Yes ▾	Customer will: - Provide current Chart of Accounts and transactional data in CSV or Excel format. - Review and complete Chart of Accounts mappings. Assumptions: - Customer's Chart of Accounts must comply with the OpenGov software's technical requirements. - Following the sign-off of the Chart of Accounts as configured in OpenGov, the Customer retains ownership to future changes, updates, and addition of new codes. Completion Criteria:

			Customer sign-off that the Chart of Accounts has been configured.
General Ledger	OpenGov will: - Configure General Ledger settings. - Provide up to five (5) hours of working sessions covering: - Configuration Review - Process walkthroughs	Yes ▾	Customer will: - Provide all current imported Journal Entries. - Provide account access details. - Validate data and reports. Completion Criteria: - Customer sign-off that the General Ledger has been configured.
Accounts Payable	OpenGov will: - Configure Accounts Payable settings and Consolidated Cash. - Import vendors. - Provide up to eight (8) hours of working sessions covering: - Configuration Review - Process walkthroughs	Yes ▾	Customer will: - Provide a bank account listing. - Provide a vendor listing. - Define user access levels and approval workflows. - Provide examples of recent invoices. - Provide a voided check copy - Provide MICR, ACH, and positive pay specifications from Customer's bank. - Attend all working sessions. - Test checks, ACH file, and positive pay file with bank for accuracy. - Validate data and review, test, and sign-off on configuration. Completion Criteria: - Customer sign-off that the Accounts Payable has been configured.
Requisitions	OpenGov will: - Configure Requisitions settings. - Provide up to eight (8) hours of working sessions covering: - Configuration Review - Process Walkthroughs	Yes ▾	Customer will: - Provide Requisition approval workflow and Departments. - Provide a purchasing policy. - Provide examples of recent Purchase Orders. Completion Criteria: - Customer sign-off that the Requisitions has been configured.
Cash Receipts	OpenGov will: - Configure Cash Receipts settings. - Provide up to five (5) hours of	Yes ▾	Customer will: Provide Receipt Categories and Receipt Groups.

	working sessions covering: ○ Configuration Review ○ Process Walkthroughs		● Provide Tender Types. ● Provide examples of current receipts. Completion Criteria: ● Customer sign-off that the Cash Receipts have been configured.
Accounts Receivables	OpenGov will: ● Configure Accounts Receivables settings. ● Import list of customers. ● Provide up to four (4) hours of working sessions covering: ○ Configuration Review ○ Process Walkthroughs	Yes ▾	Customer will: ● Provide a list of customers. ● Provide AR accounts with Balances Completion Criteria: ● Customer sign-off that the Accounts Receivable has been configured.
Fixed Assets	OpenGov will: ● Configure Fixed Assets settings. ● Provide up to six (6) hours of working sessions covering: ○ Configuration Review ○ Process Walkthroughs	Yes ▾	Customer will: ● Provide Fixed Assets data as of the end of prior FY (or last audited date) in CSV or Excel format. ● Populate the Fixed Assets upload template. Completion Criteria: ● Customer sign-off that the Fixed Assets has been configured.
Purchase Cards	OpenGov will: ● Configure Purchase Cards settings. ● Provide up to five (5) hours of working sessions covering: ○ Configuration Review ○ Process Walkthroughs	Yes ▾	Customer will: ● Complete Categories and Cardholders template. ● Provide Purchase Cards output report from Customer's bank. Completion Criteria: ● Customer sign-off that the Purchase Cards have been configured.
Platform Reporting & Analytics	OpenGov will: ● Configure "Standard Datasets" in the platform following the go-live of the General Ledger and Accounts Payable modules. ● Set up one (1) view per Standard Dataset. ● Configure the following Standard Reports: ○ Budget vs Actuals	Yes ▾	Customer will: ● Set up additional views beyond those listed as included in Standard Reports ● Review, test, and sign off on configuration ● Configure the reports to account for all funds, departments, and other segments. ● Be responsible for making any desired adjustments to reports.

	○ Monthly Statement of Revenues & Expenditures ○ Balance Sheet		Completion Criteria: ● Customer sign-off that the Standard Reports have been configured.
Custom Reporting Support	OpenGov will: ● Provide up to fifteen (15) hours of reporting support prior to project completion. These hours can be allocated to OpenGov for creating additional reports for Customer, or training and support to Customer on report creation.	Yes ▾	Customer will: ● Provide example(s) of reports that are needed. Assumptions: ● Custom Reports must comply with the OpenGov software's technical requirements. This may result in a different format or combination of reports to deliver the Customer's desired report. Completion Criteria: ● Delivery of the Custom Reporting Support as defined in the Project Plan.
Data Migration	OpenGov will: ● Extract up to Five (5) years of General Ledger Journal Entry detail and Accounts Payable Invoice detail history and vendors as well as fixed assets using a copy of Customer's legacy system database. ○ This includes one (1) year of current year to date (YTD) and the rest of the years of historical data. ● Transform the Customer's data into OpenGov's field requirements. ● Load cutover data up to two (2) times, including: ○ One (1) mock cutover ○ One (1) go-live cutover	Yes ▾	Customer will: ● Provide copies of the legacy system database as needed. ● Populate data templates provided by OpenGov where OpenGov is not able to transform data. ● Validate all data and reports prior to providing to OpenGov. ● Validate the data once it is loaded to Financial Management. ● Assist OpenGov in transforming data errors. ● Provide sign-off confirming agreement with OpenGov that the data is accurate and complete. Assumptions: ● Customer's Trial Balance is in balance by Fund at the start of the implementation. ● Customer's subsidiary ledgers are reconciled to the General Ledger. ● In the event that the Customer cannot provide database access or extract unfiltered data to delimited file(s), the

			Customer is responsible for providing transformed and read-to-load data in the OpenGov provided data templates. This means that the Customer will assume responsibility for any data mapping and required transformations. Completion Criteria: Customer sign-off that the Data Migration has been completed.
Bank Reconciliation	OpenGov will: - Configure Bank Reconciliation settings. - Provide up to four (4) hours of working sessions covering: - Configuration Review - Process Walkthrough(s)	Yes ▾	Customer will: - Provide a .pdf version of the Bank Statement used to complete their last reconciliation. - Customer will provide a bank reconciliation report in Excel format showing the last balanced reconciliation. - Customer will provide a list of outstanding checks in .csv or Excel format. Assumptions: - The Customer is current on Bank Reconciliations by the Financial Management project go-live date. If Bank Reconciliations are not current, the Change Order process will be followed. Completion Criteria: - Customer sign-off that the Bank Reconciliation has been configured.
Single Sign On (SSO)	OpenGov will: Implement identity provider initiated SSO for Microsoft ADFS, Microsoft Azure AD, or Okta.	Yes ▾	Customer will: - Complete the SSO enablement form. - Provide the information from the identity provided required to establish SAML or HTTPS certification. - Add OpenGov as a new application in Customer's identity provider. Completion Criteria: - Customer sign-off on the Integration

Training	OpenGov will: • Deliver a two-day onsite training for Administrator and End Users. The training agenda will be agreed upon between Project Managers before the training dates. Topics may include: ○ Chart of Accounts ○ Journal Entries ○ Reports and Inquiries ○ Import/Export Data ○ Vendor Records ○ Customer Records ○ Requisition Workflow ○ Invoice Approval Workflow ○ Pay Invoices ○ Cash Receipt Deposits ○ Add Invoice to Customer Acct. ○ Bank Rec for One bank ○ Fixed Assets ○ Depreciation ○ Purchase Card Transactions ○ Reporting ○ End User Reports and Inquiries ○ End User Requisition Workflow ○ End User Invoice Approval Workflow	Yes ▾	Customer will: • Identify participants for each relevant training session. Completion Criteria: • Trainings have been delivered.
User Acceptance Testing	OpenGov will: • Provide up to a two week (2-week) test period following training for the customer to review all configurations and workflows. • Provide a weekly meeting to review executed scenarios, pass/fail findings, and any documented issues. • Support re-testing of resolved issues and regression testing of resolved issues to ensure fixes do not negatively impact existing workflows. • Update Solution Blueprint to reflect the decisions made in the Train Phase.	Yes ▾	Customer will: • Execute testing within the two-week test period. • Record pass/fail and document issues with sufficient detail for resolution. • Re-test resolved issues to confirm resolution and perform regression testing to confirm existing workflows continue to function as expected. Completion Criteria: • Testing period signed off by the customer.

Launch Event	OpenGov will : ● Share a Launch Readiness Planning checklist four (4) weeks before the Launch event. ● Provide a two-day onsite Launch Event with a final load and validation of Launch data.	Yes ▾	Customer will: ● Ensure the Launch Readiness Checklist is complete prior to one (1) week before Launch. ● Coordinate Launch activities with OpenGov. Completion Criteria: ● Completion of Launch data load and validation.
Hyperadopt	OpenGov will: ● Deliver up to forty (40) hours over four (4) weeks of Hyperadopt post-launch remote sessions to provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: ● Resolve issues with OpenGov guidance. Completion Criteria: ● Hyperadopt sessions are completed according to the project plan.
Project Transition	OpenGov will: ● Prior to project closure, OpenGov will: ○ Facilitate a transition meeting with Customer Success. ○ Deliver the final Solution Blueprint document. ○ Provide a Post Deployment Score Survey link. ○ Provide Project closure sign off form.	Yes ▾	Customer will: ● Complete the Post Deployment Score Survey prior to project closure. Completion Criteria: ● Project sign off is completed.

Budgeting & Performance Advanced Professional Services Package			
Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: - Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. - Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes ▾	Customer will: - Attend sessions - Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. - Review and confirm the Project Plan and Project Charter. Completion Criteria: - Customer sign-off on the receipt of the Project Plan and Project Charter. - Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshop	OpenGov will: - Conduct a remote Validation Workshop focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during the workshop, to guide the Configure Phase.	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. Completion Criteria: - Completion of the Validation Workshop.
Budget Configuration	OpenGov will Configure one (1) Operating Budget instance and one (1) Capital Budget instance based on the outcome of the	Yes ▾	Customer will: Attend the Configuration Review Workshop to determine any

	Validation Workshop. ● Provide one (1) remote Configuration Review Workshop to evaluate the preliminary design, make adjustments, and confirm the final design for the Operating and Capital Budget. ● Create the remaining budget proposals and worksheets following the confirmed final design.		misalignment with business objectives to be corrected ● Confirming the final design. Completion Criteria: ● Customer sign-off on the Operating Budget and Capital Budget have been configured.
Workforce Planning	OpenGov will ● Configure one Workforce Plan linked to the Operating Budget instance. ● Configure cost elements based on the Customer's position calculations and tables. ● Provide up to three (3) hours of guidance on the Position Upload Template.	Yes ▾	Customer will: ● Provide existing position calculations and tables. ● Populate the Position Upload Template and upload into OpenGov. ● Maintain the Workforce Plan once configured. Completion Criteria: ● Customer sign-off on the Workforce Plan has been configured.
Budget Reporting	OpenGov will: ● Establish one (1) Operating Budget export and one (1) Capital Budget export and corresponding Dataset View to enable Reporting. ● Configure the following Reports: ○ Budget versus Actual Report ○ Budget Validation Report ○ Capital Project Five Year Forecast Report ● Configure one (1) dashboard story using the above reports.	Yes ▾	Customer will: ● Validate and sign off on Reports. ● Create saved views by fund, department, etc. as needed. ● Set up additional Reports as needed Completion Criteria: ● Customer sign-off that reports have been configured.
Online Budget Book	OpenGov will: ● Create four (4) templates and apply the customer's branding: ○ Fund ○ Department ○ Capital Project ○ Generic (Multi-Use) ● Create project and department pages from the finalized templates. ● Create three (3) Online Budget Book reports and add saved views to the	Yes ▾	Customer will: ● Provide logo and branding colors. ● Confirm finalized templates before department and project pages are created. ● Create all additional reports, saved views, templates, and pages, as desired. ● Add all content including: ○ Narrative ○ Report saved views

	project and department pages: ○ Department Report ○ Project Report ○ FTE report ● Provide up to three (3) hours of training and guidance on Online Budget Book configuration including: ○ Create pages from templates ○ Add content, Report saved views and Import Excel data		○ Excel Imports ○ Images ○ Other data ● Validate and sign off on the department and project pages. Completion Criteria: ● Customer sign-off that the project and department pages have been created.
Training	OpenGov will: ● Deliver up to ten (10) hours of remote Administrator and Department End User training. The training agenda will be agreed upon between Project Managers before the training dates. Topics may include: ○ Data Manager ○ Chart of Accounts ○ Reports ○ Budgets ○ Workforce Plans ○ Online Budget Book ○ Entering Budget Requests	Yes ▾	Customer will: ● Identify participants for each relevant training session. Completion Criteria: ● Trainings have been delivered.
User Acceptance Testing	OpenGov will: ● Provide up to a two week (2-week) test period following training for the customer to review all configurations and workflows. ● Provide a weekly meeting to review executed scenarios, pass/fail findings, and any documented issues. ● Support re-testing of resolved issues and regression testing of resolved issues to ensure fixes do not negatively impact existing workflows. ● Update Solution Blueprint to reflect the decisions made in the Train Phase.	Yes ▾	Customer will: ● Execute testing within the two-week test period. ● Record pass/fail and document issues with sufficient detail for resolution. ● Re-test resolved issues to confirm resolution and perform regression testing to confirm existing workflows continue to function as expected. Completion Criteria: ● Testing period signed off by the customer.
Launch Event	OpenGov will :	Yes ▾	Customer will:

	- Share a Launch Readiness Planning checklist two (2) weeks before the Launch event. - Move into hyperadopt after the completion of the checklist.		- Ensure the Launch Readiness Checklist is complete prior to one (1) week before Hyperadopt. Completion Criteria: - Completion of the launch readiness checklist.
Hyperadopt	OpenGov will: Deliver up to eight (8) hours over two (2) weeks of Hyperadopt post-launch remote sessions to provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: - Attend sessions - Resolve issues with OpenGov guidance. Completion Criteria: - Hyperadopt sessions are completed according to the project plan.
Project Transition	OpenGov will: - Prior to project closure, OpenGov will: - Facilitate a transition meeting with Customer Success. - Deliver the final Solution Blueprint document. - Provide a Post Deployment Score Survey link. - Provide Project closure sign off form.	Yes ▾	Customer will: - Attend sessions - Complete the Post Deployment Score Survey prior to project closure. - Sign off on project closure. Completion Criteria: - Project sign off is completed.

Human Capital Management Professional Services Package

Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: - Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. - Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes ▾	Customer will: - Attend sessions - Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities.

			- Review and confirm the Project Plan and Project Charter. Completion Criteria: - Customer sign-off on the receipt of the Project Plan and Project Charter. - Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshops	OpenGov will: - Conduct remote validation workshops focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during workshops, to guide the Configure Phase.	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. Completion Criteria: - Completion of the Validation Workshops.
Human Resources Information System	OpenGov will: - Configure Core HR including: - Employee Directory & Profile - Organization Management - Position Management - Role-based dashboards - Document management - Compliance + audit trail - Integrations to OpenGov Financial Management + Budgeting & Performance + OpenGov Payroll - Configure Organization & Position including: - Org chart & department hierarchy configuration	Yes ▾	Customer will: - Provide existing org structure, position inventory, classification codes, and bargaining unit data. Completion Criteria: - Customer sign-off that the Human Resources Information System module is configured.

	○ Position control & vacancy tracking ○ Headcount metrics (actual vs budgeted) ○ Onboarding & offboarding workflows ○ Personnel Action workflows ● Configure Leave including: ○ Leave requests & approvals ○ Leave accrual policies ○ FMLA tracking ○ Life events ○ Leave balance management ● Configure Health, Safety, & Compliance including: ○ Workers' comp (incident / claim tracking) ○ Workers' Comp Rate Structure ○ Grievance ○ FLSA ○ I-9 verification ○ EEO reporting ○ Accommodation ● Configure Reporting & Analytics including: ○ Report builder ○ Timesheet register ○ Overtime analysis ○ Comp time ○ Attendance summary ○ Personnel actions ○ EEO-4 report ○ HRBP dashboard ● Configure Manager Dashboard ● Configure Employee Self-Service including: ○ My timesheet ○ My leave ○ My benefits ○ My schedule ○ My documents ○ My requests ○ My expenses ○ Accommodations ○ Internal applications ○ W-4 / Tax Elections		
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	○ Direct Deposit / Payment Destination ● Configure Time Capture including: ○ Timesheets ○ Holiday Calendar ○ Shift differential rules ○ Break Compliance ● Configure Basic Benefits including: ○ Benefits enrollment ○ Employee Self-Service ○ Pension Plans ○ Retirement enrollment ○ Contribution management		
Payroll	OpenGov will: ● Configure Calculation Engine including: ○ 7-phase gross-to-net ○ Federal tax (IRS 2025) ○ FICA (Social Security + Medicare + 0.9% surtax) ○ 50 states + DC income tax ○ 650+ local jurisdictions ○ Multi-jurisdiction non-resident handling ● Configure FLSA & Special Pay including: ○ FLSA overtime (1.5x, 2x, 8th-hour rule) ○ Regular Rate of Pay (RROP) ○ FLSA 7(k) public-safety ○ Holiday pay ○ Shift differential application ● Configure Deductions & Garnishments including: ○ Pre-tax + post-tax deductions ○ Garnishments – 8-level priority waterfall (CCPA compliant) ○ Tax levies ○ Federal student loan ● Configure Pay Run Lifecycle including: ○ Regular pay runs ○ Off-cycle / supplemental ○ Retroactive pay ○ Void & reissue ○ Provisional / preview	Yes ▾	Customer will: ● Review, Test, and Sign off on configuration. ● Attend all working sessions. Completion Criteria: ● Customer sign-off that the Payroll module is configured

	○ Approvals + segregation of duties ● Configure Payment Output including: ○ ACH/NACHA file generation ○ Paper warrants ○ Split pay ○ Positive Pay file ○ Multiple bank accounts per employee ● Configure Tax Compliance and Filing including: ○ 941 + 941-X ○ W-2 + W-3 ○ State + local filings ○ W-2c amendments ○ 1099-R ● Configure Reporting including: ○ Payroll Register ○ Cash Requirement ○ AP invoice extract ○ GL postings ○ Quarterly Processing ○ State retirement reports ● Configure Self Service Portal including: ○ Pay stubs ○ W-2 download ○ W-4 elections ○ Direct deposit changes ○ YTD balances ○ Accrual balances ● Configure Audit & Security including: ○ Hash-based evidence per calculation ○ Full audit trail ○ PII encryption (AES-256-GCM) ○ RBAC + SOD		
Workforce Management	OpenGov will: ● Configure Advanced Time Intelligence including: ○ Multi-rate / rotating / bargaining-unit-specific shift differential	Yes	Customer will: ● Provide onboarding task inventory, required forms, IT notification contacts, and file retention policies. Completion Criteria:

	○ Advanced timesheet (multi-job, project codes) ○ Time clock hardware integration ● Configure Scheduling including: ○ Schedule building ○ Shift patterns ○ Rotation ○ Schedule groups ○ Coverage tracking ○ Full web clock + clock in / clock out ● Configure Compliance Enforcement including: ○ Geofencing ○ State-specific work-rule enforcement ○ Real-time exception alerts ● Configure Workforce Planning including: ○ Headcount planning ○ Succession planning ○ Budget modeling ○ Workforce analytics ○ Position forecasting ● Configure Advanced Position Control ● First-Responder Scheduling		● Customer sign-off that the Workforce Management module is configured.
Benefits Administration	OpenGov will: ● Configure Specialist Compliance including: ○ COBRA + retiree health notices ○ ACA 1094-C / 1095-C reporting ○ Continuation premium tracking ○ HIPAA compliance ● Configure Carrier Operations including: ○ EDI 834 carrier exchange ○ Carrier API / file adapters ○ Per-carrier mapping & companion-guide profiles ○ Reject / replay workflows ● Configure External Broker including: ● Configure Specialized Pension Administration including:	Yes ▾	Customer will: ● Provide current benefit plan documents, carrier contact information, EDI and COBRA vendor specifications, FMLA policies, and deduction rules. Completion Criteria: ● Customer sign-off that the Benefits Administration module is configured.

	○ Service credit calculation ○ Pension case lifecycle ○ Active to Retirement transition ○ Beneficiary / survivor / disability case management ○ 401(a) / 403(b) / governmental 457(b) plan operations ○ Governmental plan correction (EPCRS) ● Configure Actuarial & Audit ● Configure Advanced Benefits Operations including: ○ Total Compensation Statements ○ Advanced benefits reporting ○ Period-specific deduction selection ○ Arrears tracking ○ FSA / HSA notices ○ Vendor bill reconciliation		
Talent Acquisition	OpenGov will: ● Configure Requisition and Approval ● Configure Job Distribution ● Configure Applicant Tracking System (ATS) & Pipeline including: ○ Candidate pipeline ○ ATS ○ ATS screening ○ Civil service exam ○ Talent pool ● Configure Selection including: ○ Interview management ○ Background check integration ○ Offer management ● Configure Onboarding including: ○ Pre-hire checklists ○ New hire portal ○ I-9, W-4, direct deposit collection ○ IT equipment notifications ○ Offboarding ● Configure AI & Automation including: ○ OG Assist for recruiting ○ Resume screening ○ Workflow automation	Yes ▾	Customer will: ● Provide existing requisition approval matrix, position requirements, and job announcement formats. ● Confirm external job board subscriptions and background check vendor. Completion Criteria: ● Customer sign-off that the Talent Acquisition module is configured.

Talent Development	OpenGov will: ● Configure Performance Management including: ○ Performance review ○ Review cycle management ○ Multiple concurrent cycles ○ Probationary review ● Configure Goals & Development Plans including: ○ Goals ○ Goal progress tracking ○ Development plans ○ Work plans ● Configure Learning & Certifications including: ○ Course catalog ○ Enrollment ○ Attendance tracking ○ Training history ○ Certifications & licenses with expiry alerts ● Configure Career Growth including: ○ Career development ○ Career paths ○ Skill gap analysis ○ Internal mobility ● Configure Succession including: ○ Succession planning ○ Talent reviews ○ High-potential identification	Yes ▾	Customer will: ● Provide existing evaluation form templates, review cycle schedule, job classification list, probationary period policies, training catalog, certification and license types, required training schedules, and consortium training program details. Completion Criteria: ● Customer sign-off that the Talent Development module is configured.
Training	OpenGov will: ● Provide up to twenty-five (25) hours of remote Administrator training. The training agenda will be agreed upon between Project Managers before the training dates. Topics may include: ○ System configuration ○ Role and permission management ○ Reporting and dashboards ○ Integration and data management ● Provide up to twenty (20) hours of remote End User training. The training agenda will be agreed upon between Project Managers before	Yes ▾	Customer will: ● Identify the relevant participants to attend each training session. Completion Criteria ● Training has been conducted.

	the training dates. Topics may include: ○ Employee self-service ■ Time entry and approvals ■ Benefits enrollment ■ Performance evaluation workflows.		
Launch Event	OpenGov will : ● Share a Launch Readiness Planning checklist two (2) weeks before the Launch event. ● Provide a remote a two-day onsite a two-day onsite Launch Event after the completion of the checklist.	Yes ▾	Customer will: ● Ensure the Launch Readiness Checklist is complete prior to one (1) week before Hyperadopt. Completion Criteria: ● Completion of the launch readiness checklist.
Hyperadopt	OpenGov will: ● Deliver up to eight (8) hours over two (2) weeks of Hyperadopt post-launch remote sessions to provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: ● Attend sessions ● Resolve issues with OpenGov guidance. Completion Criteria: ● Hyperadopt sessions are completed according to the project plan.

Utility Billing Standard Professional Services Package

Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: ● Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. ● Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes ▾	Customer will: ● Attend sessions ● Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. ● Review and confirm the Project Plan and Project Charter.

			Completion Criteria: - Customer sign-off on the receipt of the Project Plan and Project Charter. - Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshops	OpenGov will: - Conduct remote validation workshops focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during workshops, to guide the Configure Phase.	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. Completion Criteria: - Completion of the Validation Workshops.
Utility Billing Configuration	OpenGov will: - Evaluate current Rate tables and Services Codes (as functions in Financial Management) and provide a recommendation for configuration. - Build crosswalks for the following functions: - Account numbers - Service Code table - Class Code table - Meters - Rate table - Configure Utility Billing settings - Complete one (1) parallel billing for a subset of data for each rate/service code type. - Complete one (1) parallel billing end-to-end for each billing cycle: - Monthly billing cycle 1 of each month - Monthly billing cycle 2 of each month	Yes ▾	Customer will: - Provide lists of all Rates, Service Codes. - Review, Test, and Sign off on configuration. - Review, Test and Sign off on all test parallel billings. - Attend all working sessions. - Provide access to utility billing data. - Provide a billing register, utility billing trial balance, and any additional reports needed for validation. Completion Criteria: - Customer sign-off on configuration

	○ Insert additional billing cycles ● Provide up to six (6) hours of working sessions following each parallel billing to cover: ○ The parallel billing results ○ Recommended configuration adjustments ○ How to validate the configuration ● Complete cutover conversion as agreed upon in the project plan and previous parallel billing ● Provide up to sixteen (16) hours of working sessions to cover: ○ Configuration Review ○ Process Walkthrough(s)		
Reporting	OpenGov will: ● Deliver reports requested by Customer and defined in the project charter, as supported with current software functionality	Yes ▾	Customer will: ● Validate delivered reports ● Own the creation of additional reports outside of those listed ● Own modifications to delivered reports. General Assumptions: ● OpenGov may deliver report in a different format or as a combination of reports Completion Criteria: ● Customer sign-off that available reports have been validated.
Data Migration	OpenGov will: ● Set up a secure SFTP site for data transfer purposes. ● Validate the following reports provided by the Customer: ○ Billing register ○ Utility billing trial balance ○ AR customer balance by service code ○ Additional reports needed for validation ● Transform the Customer's data into OpenGov's field requirements. ● Upload the following data provided by the Customer into OpenGov Financial Management:	Yes ▾	Customer will: ● Upload a copy of their database to the secure SFTP site or provide direct access to the database ● Be responsible for their data and populate data templates provided by OpenGov, where applicable. ● Validate all data and reports prior to providing to OpenGov. ● Validate the data once it has been loaded to OpenGov Financials. ● Assist OpenGov in transforming data errors. ● Provide sign-off confirming agreement with OpenGov that the data is accurate and complete.

	○ AR service account balances ○ AR Open Invoices ● Transform data errors with Customer's assistance. ● Produce and communicate errors where data, for example, is missing or does not fit segment length. ● Load cutover data up to two (2) times, including: ○ One (1) mock cutover (parallel billing) ○ One (1) go-live cutover		General Assumptions: ● In the event that OpenGov cannot access the Customer's legacy database, the Customer is responsible for providing the data to be used in the data migration. ● The Customer is able to provide attachment data for OpenGov to load. Completion Criteria: ● Customer sign-off on the Data Migration.
Training	OpenGov will: ● Provide up to ten (10) hours of training. The training agenda will be agreed upon between Project Managers before the training dates. Topics may include: ○ Cash Receipt Deposits ○ Add Invoice to Customer Account ○ Meter Read Processing ○ Utility Billing Customers and Rates ○ Billing Register and Adjustments ○ Billing Data to Processor ○ Cutoff Notices, Door Hangers ○ Receiving monies ○ Online Portal ○ Export UB General Ledger impact	Yes ▾	Customer will: ● Identify participants for each relevant training session. Completion Criteria: ● Trainings have been delivered.
User Acceptance Testing	OpenGov will: ● Provide up to a two week (2-week) test period following training for the customer to review all configurations and workflows. ● Provide a weekly meeting to review executed scenarios, pass/fail findings, and any documented issues. ● Support re-testing of resolved issues and regression testing of resolved issues to ensure fixes do not negatively impact existing workflows.	Yes ▾	Customer will: ● Execute testing within the two-week test period. ● Record pass/fail and document issues with sufficient detail for resolution. ● Re-test resolved issues to confirm resolution and perform regression testing to confirm existing workflows continue to function as expected.

	Update Solution Blueprint to reflect the decisions made in the Train Phase.		Completion Criteria: Testing period signed off by the customer.
Launch Event	OpenGov will : - Share a Launch Readiness Planning checklist two (2) weeks before the Launch event. - Provide a two-day onsite Launch Event after the completion of the checklist..	Yes ▾	Customer will: - Ensure the Launch Readiness Checklist is complete prior to one (1) week before Hyperadopt. Completion Criteria: - Completion of the launch readiness checklist.
Hyperadopt	OpenGov will: Deliver up to fifty (50) hours of hyperadopt services for a maximum of one billing cycle until each billing cycle is complete, whichever comes first. Hyperadopt post-launch remote sessions provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: - Attend sessions - Resolve issues with OpenGov guidance. Completion Criteria: - Hyperadopt sessions are completed according to the project plan.
Project Transition	OpenGov will: - Prior to project closure, OpenGov will: - Facilitate a transition meeting with Customer Success. - Deliver the final Solution Blueprint document. - Provide a Post Deployment Score Survey link. - Provide Project closure sign off form.	Yes ▾	Customer will: - Attend sessions - Complete the Post Deployment Score Survey prior to project closure. - Sign off on project closure. Completion Criteria: - Project sign off is completed.

Permitting & Licensing

Use Cases

The following Permitting & Licensing use cases provides a high-level overview of how this solution is intended to be used:

- Building Permits & Inspections, Planning & Zoning Approvals, Code Enforcement, Business Licensing, Public Works Permits

Estimated Project Duration

The estimated duration of this Permitting & Licensing project is 6-11 months including the following assumptions:

- Initiate 2-4 weeks
- Validate: 4-8 weeks
- Configure: 8-16 Weeks
- Train: 4-8 Weeks
- Launch: 2 Weeks

Implementation Requirements and Configuration

The following Implementation Requirements and Configuration section of the SOW provides a description of how the solution will be configured by OpenGov. Any items listed as “no” are outside of the scope of this implementation.

Permitting & Licensing Standard Professional Services Package			
Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: • Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. • Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes ▾	Customer will: • Attend sessions • Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. • Review and confirm the Project Plan and Project Charter. Completion Criteria: • Customer sign-off on the receipt of the Project Plan and Project Charter.

			Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshops	OpenGov will: - Conduct remote validation workshops focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during workshops, to guide the Configure Phase.	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. Completion Criteria: - Completion of the Validation Workshops.
Master Address Table	OpenGov will: - Provide a mapping template of available fields to be utilized by the Customer to map MAT information. - Provide technical requirements. - Import the customer provided MAT file.	Yes ▾	Customer will: - Provide the MAT file and complete the mapping template. - Validate the imported locations in Permitting & Licensing User Interface. Completion Criteria: - Customer Sign-off that the Master Address Table has been configured.
Record Types Configuration	OpenGov will: - Configure up to five (5) Standard Record Types (listed below) including: - Up to 100 form fields per Record Type - Up to 10 workflow steps per Record Type - Up to 100 fees per Record Type - Up to five documents per Record Type. Building & Inspection Services Record Types: - Residential Building Permit	Yes ▾	Customer will: - Review configuration and workflows during the scheduled Configuration workshop(s) and identify any misalignment with business objectives to be corrected. Assumptions: - Record types with additional fields, steps, fees, or documents will require additional configuration services and will be subject to additional cost based on assessed complexity through the Change

	Planning and Zoning Record Types: 2. Conditional Use Permit Code Enforcement Record Types: 3. Code Complaint 4. Code Case Public Works Record Types: 5. Right of Way Permit Business Licensing Record Types: 6. Business License • Facilitate a Configuration Review session to evaluate the initial configuration and identify any misalignment with business objectives to be corrected. • Complete one (1) round of revisions for each template based on changes identified by the Customer during the Configuration Review. • Update the Solution Blueprint to reflect the decisions made in the Configuration Phase		Order process. Completion Criteria: • Customer sign-off on the system readiness to move into the train phase.
ESRI ArcGIS Server Integration	OpenGov will: • Integrate with the Customer's ArcGIS public API endpoint.	Yes ▾	Customer will: • Provide public API endpoint. Completion Criteria: • Customer sign-off on the Esri Integration
GIS Flag Integration	OpenGov will: • Provide a template file to be utilized by the Customer to populate GIS Flag information. • Import the populated template file after acceptance. • Enable the GIS Flag Integration.	Yes ▾	Customer will: • Populate and validate the flag template file. • Provide a publicly accessible GIS REST Service of the desired GIS Flag polygon layers and parcel layer that includes a linking field. Completion Criteria: • Customer sign-off on the GIS flag Integration

Accounting and Finance Export	OpenGov will: • Provide an export of financial data, based on the Customer's provided format, to the Customer's FTPS as often as nightly.	Yes ▾	Customer will: • Provide designated email address(es) where the nightly export will be sent • Agree upon all required OpenGov specifications prior to export. Completion Criteria: • Customer sign-off on the accounting and finance Integration
Autofill Integration	OpenGov will: • Provide up to three (3) Autofills using source data from OpenGov, WA, MA, CT, NC, MI, RI, CA, MN, AR State Contractor Database, or provided by the Customer.	Yes ▾	Customer will: • Provide the source data, if applicable, and agree upon specifications prior to upload. Completion Criteria: • Customer sign-off on the autofill Integration
Stripe Payment Processing Set-Up	OpenGov will: • Provide instructions and guidance to set up a Stripe Connected Account and validate connection via native Stripe payment processing integration. • Provide Stripe payment testing instructions and guidance.	Yes ▾	Customer will: • Create Stripe Connected Account according to OpenGov instructions and complete all required setup. • Test Stripe credit card payments in advance of the Launch phase. Assumptions: • Stripe is the only native payment processor supported by OpenGov. Any other payment-processing needs that involve third-party processors, gateways, or custom payment integrations are out of scope. Any such requirements will require a separate feasibility evaluation and may be handled as a future enhancement or separate project. Completion Criteria: • Customer sign-off on the Integration
Single Sign On (SSO)	OpenGov will:	Yes ▾	Customer will: • Complete the SSO enablement form.

	Implement identity provider initiated SSO for Microsoft ADFS, Microsoft Azure AD, or Okta.		- Provide the information from the identity provided required to establish SAML or HTTPS certification. - Add OpenGov as a new application in Customer's identity provider. Completion Criteria: - Customer sign-off on the Integration
Standard Data Migration	OpenGov will: - Perform one (1) historic data migration from a single source system using flat files provided by and mapped by the customer. - Set up historical record types, historical data will be migrated prior to the initial data load. - Provide a report of unmatched locations - Provide instructions for customer validation of data migration. - Provide up to one (1) initial load, two (2) format changes, and one (1) final load allowing for necessary edits to be made during the testing and validation process.	Yes ▾	Customer will: - Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. - Configure Record Types to align with the Project Plan's Go Live and cutover to ensure the - Sign off on data load. Assumptions: - Data must be provided via flat file. If only a Database Back Up is provided, additional data migration services will be subject to an additional cost based on assessed complexity through the Change order Process. - Data Migration does not include: more than 250,000 historical records, cleansing of corrupt data, creation or linking of applicant accounts, integration of historical fees and payments into workflow or financial reports, logs of permit changes, migration of data into the workflow, permit attachments, import of contractor database, or hierarchical relationships between records. - Data Migration encompasses all records from the legacy system. Completion Criteria: - Customer sign-off on the initial test load, up to two format change(s), and the final load.

Standard Document Migration	OpenGov will: ● Migrate documents attached to either migrated permits or locations provided through a Master Address Table (MAT) integration.	Yes ▾	Customer will: ● Provide OpenGov with confirmation that the Document Migration has been completed Assumptions: ● Document Migration does not exceed 1TB Completion Criteria: ● Customer sign-off on the initial test load and the final load.
Training	● Provide up to twenty five (25) hours of remote Administrator and End User Training . The training agenda will be agreed upon between Project Managers before the training dates. Topics may include: ○ Public Portal ○ Employee App Settings ○ Create/Edit record Types ○ Manage inboxes/tasks ○ Take payments ○ Conduct inspections ○ Create records	Yes ▾	Customer will: ● Identify the relevant participants to attend each training session. Completion Criteria ● Training has been conducted.
User Acceptance Testing	OpenGov will: ● Provide up to a two week (2-week) test period following training for the customer to review all configurations and workflows. ● Provide a weekly meeting to review executed scenarios, pass/fail findings, and any documented issues. ● Support re-testing of resolved issues and regression testing of resolved issues to ensure fixes do not negatively impact existing workflows. ● Update Solution Blueprint to reflect the decisions made in the Train Phase.	Yes ▾	Customer will: ● Execute testing within the two-week test period. ● Record pass/fail and document issues with sufficient detail for resolution. ● Re-test resolved issues to confirm resolution and perform regression testing to confirm existing workflows continue to function as expected. Completion Criteria: ● Testing period signed off by the customer.
Launch Event	OpenGov will :	Yes ▾	Customer will:

	• Share a Launch Readiness Planning checklist two (2) weeks before the Launch event. • Move into hyperadopt after the completion of the checklist.		• Ensure the Launch Readiness Checklist is complete prior to one (1) week before Hyperadopt. Completion Criteria: • Completion of the launch readiness checklist.
Hyperadopt	OpenGov will: • Deliver up to eight (8) hours over two (2) weeks of Hyperadopt post-launch remote sessions to provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: • Attend sessions • Resolve issues with OpenGov guidance. Completion Criteria: • Hyperadopt sessions are completed according to the project plan.
Project Transition	OpenGov will: • Prior to project closure, OpenGov will: ○ Facilitate a transition meeting with Customer Success. ○ Deliver the final Solution Blueprint document. ○ Provide a Post Deployment Score Survey link. ○ Provide Project closure sign off form.	Yes ▾	Customer will: • Attend sessions • Complete the Post Deployment Score Survey prior to project closure. • Sign off on project closure. Completion Criteria: • Project sign off is completed.

Enterprise Asset Management

Use Cases

The following Enterprise Asset Management use cases provides a high-level overview of how this solution is intended to be used:

- Water Distribution, Transportation, Walkability, Signals, Stormwater, Parks and Recreation, Facilities, Wastewater Collection / Sanitary Sewer, Water Distribution, Wastewater Treatment Plant

Estimated Project Duration

The estimated duration of this Enterprise Asset Management project is fourteen (14) months.

Implementation Requirements and Configuration

The following Implementation Requirements and Configuration section of the SOW provides a description of how the solution will be configured by OpenGov. Any items listed as “no” are outside of the scope of this implementation.

Enterprise Asset Management Professional Services Package			
Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: • Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. • Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes ▾	Customer will: • Attend sessions • Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. • Review and confirm the Project Plan and Project Charter. Completion Criteria: • Customer sign-off on the receipt of the Project Plan and Project Charter. • Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshop	OpenGov will:	Yes ▾	Customer will:

	- Conduct a remote thirty two (32) hour validation workshop focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during workshops, to guide the Configure Phase.		- Identify functional business owners and SMEs to attend sessions. Completion Criteria: - Completion of the Validation Workshops.
Asset Types and Workflow Configuration	OpenGov will: - Enable the out-of-the-box asset types for the following Domains: Water Distribution, Transportation, Walkability, Signals, Stormwater, Parks and Recreation, Facilities, Wastewater Collection / Sanitary Sewer, Water Distribution, Wastewater Treatment Plant - Implement the standard configuration for each of the above Domains: - Up to ten (10) custom fields and up to two (2) custom layouts per asset type. - Up to thirty (30) custom fields and up to ten (10) custom layouts to be utilized in any of the shared areas of the system, such as Tasks - Provide Up to twenty (20) automations - Provide Up to twenty (20) preventative maintenance plans	Yes -	Customer will: - Assign EAM administrator role and responsibilities to at least one Customer team member. - Own configuration updates within the sandbox environment after the configuration phase is complete. Assumptions: - Standard fields, layouts, automations, and preventative maintenance plan configuration services by domain represent an upper limit of OpenGov configurations completed during the configuration phase. - Domains with additional fields, layouts, automations, and preventative maintenance plans will require additional configuration services and will be subject to additional cost based on assessed complexity through the Change Order process. Completion Criteria: - Delivery of the sandbox environment to Customer.

Configuration Review Workshops	- Conduct up to eight (8) configuration review workshops, following the initial system configuration, focused on: - Demonstrating the functional environment - Identifying misalignment with defined business objectives. - Implementing necessary corrections and adjustments required to move into the Train Phase. - Update Solution Blueprint to reflect the decisions made in the Configuration Phase	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. - Review configuration and workflows during the workshops and identify any misalignment with business objectives to be corrected. - Sign off on the system readiness to move into the train phase. Completion Criteria: - Sign off on system readiness to enter the Train Phase.
Esri GIS Integration	Provide up to two (2) remote sessions for Customer technical GIS staff to configure Esri Feature Services for the bidirectional GIS integration and authentication.	Yes ▾	Customer will: - Make and maintain the connection to the Customer's Esri GIS instance. Assumptions: - OpenGov EAM can integrate with one Esri instance. Completion Criteria:
Standard Data Import: Resources, Libraries, and Users/Roles	OpenGov will: - OpenGov will provide template documents for data population. Once populated by Customer staff, OpenGov will load the data into Customer sandbox or production OpenGov Asset Management environment. Data loads may include data such as: - Parent level asset records, Asset location (spatial x/y) attributes, - Parent level resource (Labor, Equipment Material, Vendor) records, - Resource Rate (Labor, Equipment, Material) records, and - Standard system libraries	Yes ▾	Customer will: - Provide startup data in OpenGov provided templates by agreed upon due date determined during validation phase. Assumptions: - Standard Data import does not include work history, total cost history, condition inspection data, requests, attachments etc which require a data conversion. Completion Criteria: - Start up date is loaded.

	Provide one (1) sandbox and one (1) production data load service through standard import/export functionality.		
Data Conversion	OpenGov will: - Provide up to one (1) data conversion service from one (1) source system, Brightly, for the following data types: assets, work history, total cost history, inspections, requests,, and attachments for up to 250,000 records and 50 asset types including: - A review of historical data with recommendations for OpenGov best fit. - A field map workshop to identify where and how historical data will appear in OpenGov. - One (1) test conversion to facilitate data conversion validation and testing. - One (1) revision of the field map used for the test conversion service. - One (1) production conversion service utilizing the final, approved field map.	Yes ▾	Customer will: - Provide conversion data requested within the timeline dictated in the Customer Responsibilities section of this SOW Assumptions: - All data must be accessible to OpenGov from a SQL DB, SQL View, Access DB, or Comma Delimited Files. Exclusions: - Child records and associated child level attributes - Resources
Single Sign On (SSO)	OpenGov will: Implement identity provider initiated SSO for Microsoft ADFS, Microsoft Azure AD, or Okta.	Yes ▾	Customer will: - Complete the SSO enablement form. - Provide the information from the identity provided required to establish SAML or HTTPS certification. - Add OpenGov as a new application in Customer's identity provider. Completion Criteria: - Customer sign-off on the Integration
Training	OpenGov will: Provide up to twenty four (24) hours of remote training sessions. The training agenda will be agreed	Yes ▾	Customer will: Identify the relevant participants to attend each training session.

	upon between Project Managers before the training dates. Topics may include: ○ System Overview ○ Asset Builder ○ Preventative Maintenance Plans ○ Advanced Inspections, Asset Condition Manager, Asset Risk and Scenario Builder ○ Internal Requests ○ Advanced Material Management ● Deliver up two(2) - three (3)-day (3-day) onsite Train the Trainer Event. The training agenda to be agreed upon between project managers before the training dates. Topics may include: ○ Request Management ○ Work Management ○ Asset Management ○ Resource Management ○ Mobile ○ Fleet Management ○ Administrator Settings		Completion Criteria ● Training has been conducted.
User Acceptance Testing	OpenGov will: ● Provide up to a two week (2-week) test period following training for the customer to review all configurations and workflows. ● Provide a weekly meeting to review executed scenarios, pass/fail findings, and any documented issues. ● Support re-testing of resolved issues and regression testing of resolved issues to ensure fixes do not negatively impact existing workflows. ● Update Solution Blueprint to reflect the decisions made in the Train	Yes ▾	Customer will: ● Execute testing within the two-week test period. ● Record pass/fail and document issues with sufficient detail for resolution. ● Re-test resolved issues to confirm resolution and perform regression testing to confirm existing workflows continue to function as expected. Completion Criteria:

	Phase.		Testing period signed off by the customer.
Launch Event	OpenGov will : - Share a Launch Readiness Planning checklist four (4) weeks before the Launch event. - Following the completion of the Launch readiness planning checklist, execute the Launch event with a final data load and cut over to production.	Yes ▾	Customer will: - Ensure the Launch Readiness Checklist is complete prior to one (1) week before Launch. - Coordinate Launch activities with OpenGov. Completion Criteria: - Completion of Launch event.
Hyperadopt	OpenGov will: Deliver up to twelve (12) over two (2) weeks of Hyperadopt post-launch remote sessions to provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: - Attend sessions - Resolve issues with OpenGov guidance. Completion Criteria: - Hyperadopt sessions are completed according to the project plan.
Project Transition	OpenGov will: - Prior to project closure, OpenGov will: - Facilitate a transition meeting with Customer Success. - Deliver the final Solution Blueprint document. - Provide a Post Deployment Score Survey link. - Provide Project closure sign off form.	Yes ▾	Customer will: - Attend sessions - Complete the Post Deployment Score Survey prior to project closure. - Sign off on project closure. Completion Criteria: - Project sign off is completed.

Government App Builder

Use Cases

The following Government App Builder use cases provides a high-level overview of how this solution is intended to be used:

- 311 Request Management

Estimated Project Duration

The estimated duration of this Enterprise Asset Management project is 1-2 months including the following assumptions:

- Initiate 1-2 weeks
- Validate: 1-2 weeks
- Configure: 2-4 Weeks
- Train: 1-2 Weeks
- Launch: 1-2 Weeks

Implementation Requirements and Configuration

The following Implementation Requirements and Configuration section of the SOW provides a description of how the solution will be configured by OpenGov. Any items listed as “no” are outside of the scope of this implementation.

311 Request Management Standard Professional Services Package			
Deliverable Name	Description	In Scope	Assumptions
Project Initiation	OpenGov will: • Conduct a Project Kick-Off Session to verify project deliverables, required customer data formats, and desired business outcomes. • Prepare the Project Plan and Project Charter following the Project Kick-off session.	Yes	Customer will: • Attend sessions • Deliver applicable data and documentation required for the Validate Phase in accordance with timeliness established under Customer Responsibilities. • Review and confirm the Project Plan and Project Charter. Completion Criteria:

			- Customer sign-off on the receipt of the Project Plan and Project Charter. - Customer has provided all required data in a format defined by Exhibit 2: Technical Requirements.
Validation Workshop	OpenGov will: - Conduct a remote four (4) hour validation workshop focused on: - Validating functional requirements for all modules in scope. - Recommending best practice configuration to align to Customer's business objectives. - Identifying risks and proposing mitigation strategies. - Draft the Solution Blueprint document, reflective of information gathered during workshops, to guide the Configure Phase.	Yes ▾	Customer will: - Identify functional business owners and SMEs to attend sessions. Completion Criteria: - Completion of the Validation Workshops.
Request/Issue Catalog	OpenGov will: - Define catalog taxonomy and metadata; configure categories, subcategories, and article templates - Provide enablement on ongoing content governance.	Yes ▾	Customer will: - Supply existing catalog lists and knowledge content; designate content owners - Review layouts and content structure; approve final catalog and initial article set. Assumptions: - Content writing and localization are Customer responsibilities unless otherwise contracted. - External website CMS updates (outside of the 311 portal) are out of scope. Completion Criteria:

			- Request/Issue catalog configured and linked to intake workflows. - Initial knowledge base articles published. - Governance approach documented.
Geofencing	OpenGov will: - Configure geofencing within the CRM to identify constituents, cases, and related records within approved geographic boundaries, including point-and-radius, street segment, polygon, ward, neighborhood, and other City GIS/service-area layers. - Enable authorized users to preview impacted records and use geofenced audiences for workflows such as water main breaks, emergency notifications, service disruptions, and targeted community outreach. - Integrate geofencing with the City's approved GIS and address data sources, with validation during testing; geofencing accuracy depends on source data quality, and real-time tracking, advanced spatial analytics, and custom GIS development are out of scope unless separately scoped.	Yes ▾	Completion Criteria: Geofencing has been configured.
Service Request Intake & Form (Web & Browser Accessible Mobile)	OpenGov will: Configure one (1) generic intake form including: data tables, fields, validations, conditional logic,	Yes ▾	Customer will: Provide field-level requirements, current scripts, categories, and mandatory data elements.

	attachments, and layouts. ● Implement address capture and geocoding using standard capabilities and/or GIS integration when in scope. ● Conduct review sessions and iterate to finalize.		● Participate in reviews; provide consolidated feedback. ● Validate permissions, logic, and layouts for internal and resident users ● Approve final configurations. Assumptions: ● Designs leverage standard form capabilities and controls; custom web or native mobile apps are out of scope unless explicitly stated ● Public site branding assets provided by Customer. Completion Criteria: ● Forms/tables configured and tested ● Address capture/geocoding validated (if in scope). ● Required data capture confirmed ● Customer approval received.
Workflow, Triage & Routing	OpenGov will: ● Configure one (1) workflow with routing rules, ownership groups, task states, reassignment, and collaboration steps. ● Implement prioritization logic and triage forms. ● Document workflows and test with Customer.	Yes ▾	Customer will: ● Provide current process maps, ownership matrices, and escalation criteria. ● Participate in testing and refinement; approve final logic. Assumptions: ● Automation will use standard workflow options; custom code is out of scope unless listed. ● Location-based routing requires GIS layers and data provided by Customer. Completion Criteria:

			• Workflows live with routing functioning. • Ownership groups and queues configured. • Approval received from Customer.
SLAs, Notifications & Escalation	OpenGov will: • Configure one (1) SLA timers across all request types (acknowledgment, first response, resolution), indicators, and dashboards. • Set up resident communications (email/SMS when in scope) and status updates • Configure escalations to supervisors and leadership.	Yes ▾	Customer will: • Provide SLA definitions per category and business hours/holiday calendars. • Approve notification templates and escalation paths. • Validate end-to-end SLA behavior. Assumptions: • SMS/email providers and associated fees are Customer responsibilities unless otherwise contracted. • Two-way messaging outside of standard capabilities may require a Change Order. Completion Criteria: • *SLAs operational with monitoring in dashboards • Notifications and escalations tested • Customer approval received.
Integration with OpenGov Enterprise Asset Management (EAM)	OpenGov will: • Enable bi-directional sync so 311 Request Management requests can create EAM work orders when criteria are met, and status updates in EAM reflect back to 311 and the public status page where appropriate.	Yes ▾	Customer Responsibilities: • Provide or confirm EAM environment details, credentials, and test data; confirm asset/address cross-walks. • Validate mapping, status cross-reference, and acceptance criteria. • Coordinate with any internal EAM administrators for endpoint access/windows.

	- Define decision rules for work-order creation (e.g., by category/high-alert flag). - Map fields between 311 Request Management and EAM (request ID, category, asset/location, status codes, dates). - Implement API-based integration or agreed method; handle error validation and retries. - Configure read-backs of EAM status/progress for resident-friendly display on the status page. - Provide technical runbook and data-mapping documentation.		Boundaries & Assumptions - Scope is limited to OpenGov 311 Request Management ↔ OpenGov EAM integration; other third-party systems are out of scope. - Integration follows standard, supported API capabilities; custom EAM extensions are excluded. Completion Criteria: - End-to-end tests demonstrate work-order creation and status synchronization; integration documentation delivered; stakeholder approval received.
Reporting & Dashboards	OpenGov will: - Configure one (1) reporting dashboard, filters, and visualizations for up to ten (10) fixed widgets. - Provide enablement on managing report parameters and publishing.	Yes ▾	Customer will: - Define KPIs and reporting needs; provide examples of internal and public reporting. - Review layouts and logic; test exports; designate owners for ongoing reporting. Assumptions: - Reports rely on data available in configured tables or approved imports/integrations. - Complex, custom templates outside of standard exports may require a Change Order.

			Completion Criteria: • Reports and dashboards live with accurate data. • Permissions verified; export formats tested • Customer approval received.
Configuration Review Workshops	• Conduct up to four (4) configuration review workshops, following the initial system configuration, focused on: ○ Demonstrating the functional environment ○ Identifying misalignment with defined business objectives. ○ Implementing necessary corrections and adjustments required to move into the Train Phase. • Update Solution Blueprint to reflect the decisions made in the Configuration Phase	Yes ▾	Customer will: • Identify functional business owners and SMEs to attend sessions. • Review configuration and workflows during the workshops and identify any misalignment with business objectives to be corrected. • Sign off on the system readiness to move into the train phase. Completion Criteria: • Sign off on system readiness to enter the Train Phase.
Single Sign On (SSO)	OpenGov will: • Implement identity provider initiated SSO for Microsoft ADFS, Microsoft Azure AD, or Okta.	Yes ▾	Customer will: • Complete the SSO enablement form. • Provide the information from the identity provided required to establish SAML or HTTPS certification. • Add OpenGov as a new application in Customer's identity provider. Completion Criteria: • Customer sign-off on the Integration
Training	OpenGov will: • Provide up to four (4) hours of remote training sessions. The training agenda will be agreed upon between Project Managers before the training dates. Topics may include:	Yes ▾	Customer will: • Identify the relevant participants to attend each training session. Completion Criteria • Training has been conducted.

	○ Form edits ○ Report creation ○ Workflow adjustments ○ SLA configuration ○ Permission controls ● Deliver up to four (4) Train the Trainer Event. The training agenda to be agreed upon between project managers before the training dates. Topics may include: ○ Practice exercises ○ Understanding of responsibilities ○ Quick reference guides		
Public/User-Facing Collateral	OpenGov will: ● Draft how-to guides with screenshots and FAQs; deliver PDF and web-optimized formats. ● Review drafts with Customer for accuracy; finalize collateral.	Yes ▾	Customer will: ● Review and provide feedback; approve final content; handle distribution and any localization. Assumptions: ● Content reflects current forms and processes at go-live. ● Accessibility/translation needs identified by Customer. Completion Criteria: ● Guides finalized and approved; published via Customer channels.
User Acceptance Testing	OpenGov will: ● Provide up to a two week (2-week) test period following training for the customer to review all configurations and workflows. ● Provide a weekly meeting to	Yes ▾	Customer will: ● Execute testing within the two-week test period. ● Record pass/fail and document issues with sufficient detail for resolution.

	review executed scenarios, pass/fail findings, and any documented issues. - Support re-testing of resolved issues and regression testing of resolved issues to ensure fixes do not negatively impact existing workflows. - Update Solution Blueprint to reflect the decisions made in the Train Phase.		- Re-test resolved issues to confirm resolution and perform regression testing to confirm existing workflows continue to function as expected. Completion Criteria: - Testing period signed off by the customer.
Launch Event	OpenGov will : - Share a Launch Readiness Planning checklist four (4) weeks before the Launch event. - Following the completion of the Launch readiness planning checklist, execute the Launch event with a final data load and cut over to production.	Yes ▾	Customer will: - Ensure the Launch Readiness Checklist is complete prior to one (1) week before Launch. - Coordinate Launch activities with OpenGov. Completion Criteria: - Completion of Launch event.
Hyperadopt	OpenGov will: Deliver up to twelve (12) twelve (12) sixteen (16) hours over two (2) weeks of Hyperadopt post-launch remote sessions to provide assistance as needed, reinforce workflows, and encourage adoption across the solution.	Yes ▾	Customer will: - Attend sessions - Resolve issues with OpenGov guidance. Completion Criteria: - Hyperadopt sessions are completed according to the project plan.
Project Transition	OpenGov will: - Prior to project closure, OpenGov will: - Facilitate a transition meeting with Customer Success. - Deliver the final Solution Blueprint document. - Provide a Post Deployment Score Survey link.	Yes ▾	Customer will: - Attend sessions - Complete the Post Deployment Score Survey prior to project closure. - Sign off on project closure. Completion Criteria: - Project sign off is completed.

	○ Provide Project closure sign off form.		
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Exhibit 2: Technical Requirements

General

Hardware/Solution	Technical Requirements
Computers, tablets or other user devices	Access to the internet; Google Chrome is the recommended browser for optimal performance.
General Requirement	The Customer is responsible for providing clean data. OpenGov will not cleanse, clean up, or correct Customer data for import.
SSO	SAML or HTTPS certificate, Whitelist OpenGov in Customer VPN or firewall

ERP - Financial Management

Hardware/Solution	Technical Requirements
Printer	MICR ink compatible
Check Stock	Blank, 8 1/2" x 11", check at the bottom
Cash Drawers	MMF Cash Drawer - Value Line or MMP Cash Drawer - Advantage
Receipt Printer	Model options: Ithaca 9000 - Thermal Printer, Epson T20III - Thermal, Thermal/inkjet, Epson TM-H6000IV
Thermal Paper	Compatible with receipt printer
Scanner (Optional)	Twain driver scanner
Chart of Accounts	- Flat file .csv, .xls, .xlsx with headers - Active Accounts and Accounts with activity in the years of data being loaded into OpenGov.
Vendor Listing	- Flat file .csv, .xls, .xlsx with headers
Customer Listing	- Flat file .csv, .xls, .xlsx with headers
Trial Balance	- Flat file .csv, .xls, .xlsx with headers 3-5 Years of Data

Current Budget	- Flat file .csv, .xls, .xlsx with headers
Unpaid Invoice Report	- Flat file .csv, .xls, .xlsx with headers
Calendar YTD 1099 totals by vendor and tax payment type	- Flat file .csv, .xls, .xlsx with headers
Fixed Assets Data	- Flat file .csv, .xls, .xlsx with headers
Bank Statement	.pdf
Bank Reconciliation Report	- Flat file .csv, .xls, .xlsx with headers
Outstanding Checks and Deposits List	- Flat file .csv, .xls, .xlsx with headers
AR Customer Balance by Service Code	- Flat file .csv, .xls, .xlsx with headers

ERP - Budgeting & Planning

Hardware/Solution	Technical Requirements
Financial Data Files (Transactional Export)	- Flat file .csv, .xls, .xlsx with headers 3-5 Years of Data
Financial Data Files (Summary Revenue and Expense Export)	PDF export
Current Budget	- Flat file .csv, .xls, .xlsx with headers - Operating Budget
Personnel Calculations and Tables	PDF, Word, csv, .xls, .xlsx with headers
Logo Image	.jpg or .png format - Transparent
Branding Guidelines	Hex codes

ERP - Payroll

Hardware/Solution	Technical Requirements
Employee Master File	• csv, .xls, .xlsx with headers
ACH / Direct Deposit	• ACH banking credentials and file format requirements for direct deposit processing (NACHA format).

ERP - Human Capital Management

Hardware/Solution	Technical Requirements
Identity Provider	• Microsoft ADFS, Microsoft Azure AD, or Okta required for SSO integration. Identity provider metadata (XML) must be available prior to SSO configuration.
Background Check Integration	• Third-party background check vendor must provide API credentials or supported integration method prior to Recruiting configuration
COBRA Third-Party Vendor	• COBRA vendor must provide file exchange specifications prior to Benefits configuration
Benefit's Carrier EDI	• Health carrier EDI enrollment exchange specifications must be provided prior to Benefits configuration.
Worker's Compensation Vendor	• If integrating with a third-party WC vendor, API or file transfer specs must be provided prior to Payroll configuration.

Government App Builder

Hardware/Solution	Technical Requirements
Flat file integrations	• Customer must: ○ Provide OpenGov with the export file (a delimited file) from the external system ○ Automate the export and/or import of data into and out of the external system.
API Integrations	• Customer is responsible for: ○ Fees associated with purchasing the external system ○ Providing OpenGov with access to the API and/or access to technical staff from that vendor.

	○ Access to a test instance of the third party API including a URL, authentication credentials, and relevant documentation. ○ Changes to scope resulting from a change in the third-party vendor's API. ○ Testing expected workflows and data in both test and production environments ● To display a location on a map, the third party system must be able to provide location data via their API, as shapes or coordinates. Text addresses are limited to populating address fields.
Data Migration	● All data must be accessible to OpenGov in Excel or CSV format ● Maximum historical record count: 500

Permitting & Licensing

Hardware/Solution	Technical Requirements
Address data	● All addresses must have a unique ID ● Flat file, .csv, .xls, .xlsx, .txt with headers ● Parcels and address points recommended ● Recommended source data: Esri GIS, Alternative source options include: Assessor's database, E911
ESRI ArcGIS	● A single publicly-accessible secure ESRI REST API URL
ArcGIS Flags	● Polygon Layer(s) via ESRI REST API URL, Polylines and points are not supported ● Flags will be populated via the same Publicly-accessible secure ESRI REST API URL as provided for the ESRI ArcGIS integration.
Autofill	● External source data: flat file, .csv, .xls, .xlsx, .txt with headers
Permits/Applications	● Forms, workflows, fee structures and output documents must be provided in PDF, Word, .csv, .xls, .xlsx with headers
Historical Data	● Flat file, .csv, .xlsx with headers ● Record type and status mapping using OpenGov template
Historical Documents	● Flat file, .csv, .xlsx with headers ● One row per document. All rows must be tied back to the MAT's unique ID field and have a file path or publicly accessible URL.

	• Special characters, outside of the following list, are not supported and will be removed from file names upon migration to OpenGov. ○ Alphanumeric characters ■ A-z ■ A-Z ■ 0-9 ○ Special characters ■ Exclamation point (!) ■ Hyphen (-) ■ Underscore (_) ■ Period (.) ■ Asterisk (*) ■ Single quote (') ■ Open parenthesis ((■ Close parenthesis ())
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Enterprise Asset Management

Hardware/Solution	Technical Requirements
Esri GIS	• For any asset types that are geoconnected (i.e., tied to Esri feature services), users must authenticate using a valid Esri identity in order to create, update, or delete those assets.
Data conversions	• All data must be accessible to OpenGov from a SQL DB, SQL View, Access DB or Comma Delimited Files.