

RESOLUTION NO. 24-030

**A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF KEY WEST, FLORIDA, APPROVING THE THE PURCHASE OF HUMAN CAPITAL MANAGEMENT PLATFORM AND IMPLEMENTATION FROM ORACLE AND SUBCONTRACTOR FOURTHSQUARE IN AN AMOUNT NOT TO EXCEED \$268,998 FOR THE TRANSITION OF ALL HUMAN RESOURCE PROCESSES PURSUANT TO SECTION 2-797(4) (B) OF THE CODE OF ORDINANCES, BEST INTERESTS OF THE CITY; AUTHORIZING ANY NECESSARY BUDGET TRANSFERS AND ADJUSTMENTS; AUTHORIZING THE CITY MANAGER TO EXECUTE NECESSARY DOCUMENTS UPON ADVICE AND CONSENT OF THE CITY ATTORNEY; PROVIDING FOR AN EFFECTIVE DATE.**

WHEREAS, Key West Code of Ordinances section 2-797(4) (B) permits the purchase of goods and services if in the opinion of the city manager exceptional circumstances exist to exempt a purchase from the competitive bid requirements of this subdivision for the best interests of the city, the city manager shall place a resolution before the city commission for approval of such exemption; and

WHEREAS, City staff obtained three price quotes for a Human Capital Management platform, to include recruitment, core HR, and performance management providing the lowest bid, and City staff believes Oracle and FourthSquare provides a platform and implementation that will be sustainable with other city programs; and

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF KEY WEST, FLORIDA, AS FOLLOWS:

Section 1: That the purchase of Oracle Fusion Human Capital Management Platform with implementation through FourthSquare, in the amount of \$268,998.00 is hereby approved for the Human Resources Department, Section 2-797(4)(b) of the Key West Code of Ordinances.

Section 2: That funding in the amount of \$40,000.00 is available in Human Resources Funds Account 001-1302-513-5400 and \$228,998.00 is available under ARPA funding for Public Health - Negative Economic Impact - Public Sector Capacity (EC 3) and is hereby authorized to fully fund this procurement. Any necessary budget transfers or adjustments are hereby authorized.

Section 3: That the City Manager or Designee is authorized to execute necessary documents for this procurement, upon consent of the City Attorney.

Section 4: That this Resolution shall go into effect

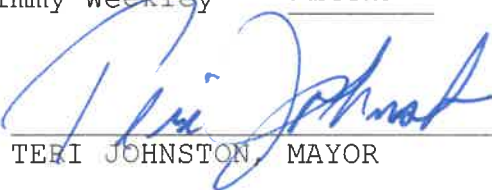
immediately upon its passage and adoption and authentication by the signature of the Presiding Officer and the Clerk of the Commission.

Passed and adopted by the City Commission at a meeting held this 8th day of February, 2024.

Authenticated by the Presiding Officer and Clerk of the Commission on 8th day of February, 2024.

Filed with the Clerk on February 8, 2024.

Mayor Teri Johnston	<u>Yes</u>
Vice Mayor Sam Kaufman	<u>Yes</u>
Commissioner Lissette Carey	<u>No</u>
Commissioner Mary Lou Hoover	<u>Yes</u>
Commissioner Clayton Lopez	<u>Absent</u>
Commissioner Billy Wardlow	<u>No</u>
Commissioner Jimmy Weekley	<u>Absent</u>

  
TERI JOHNSTON, MAYOR

ATTEST:

  
KERI O'BRIEN, CITY CLERK




## MEMORANDUM

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**Date:** February 8, 2024

**To:** Honorable Mayor and Commissioners

**Via:** Albert P. Childress   
City Manager

**From:** Bridget J. Flores  
Director of Human Resources

**Subject:** **24-5414 Resolution to purchase Human Capital Management Platform**

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### Introduction

City Manager and Human Resource Director request authorization to purchase a Human Capital Management Platform with implementation from Oracle and Fourth Square for \$268,998.00 without formal competitive procurement under Sect 2-797 (4) Exempt Contractual Services, in the best interest of the City.

### Background

The City of Key West began researching Human Capital Management Systems in 2021 focusing on those specifically focused on local government. Human Resources has "ear marked" \$40,000 to \$55,000 each budget cycle since 2022. In August 2023, the HR Director began researching the following platforms:

1. Paylocity
2. NeoGov
3. Oracle
4. Workday

After researching each platform, assessing the portability and compatibility with the current payroll system (Central Square/One Solution) including software demonstrations attended by Human Resources, IT, Finance and Payroll a decision was made to move forward with Oracle Fusion Human Capital Management and Recruiting Service.

Proposals all include a recruiting platform with online applications, onboarding, core human resource personnel database, performance management (evaluation system), workflows for personnel action forms, and employee self-service.

Paylocity, NeoGov, and Oracle provided annual platform subscription quotes for a 4-year term. Workday provided a higher cost verbally but did not submit a written proposal.

The 4-year subscription costs quoted for each system is as follows:

1. Paylocity \$146,960
2. NeoGov \$246,892
3. Oracle \$160,000
4. Workday N/A

In addition to the subscription costs, the compatibility with the current or proposed City of Key West applications as well as the extraction and conversion of our current personnel data from the Naviline and One Solution systems is an integral part of the selection of a new HCM solution.

Oracle is the only HCM proposal which offers a solution that will interface with our current application. Oracle has proposed to complete a daily or weekly transfer of all data to One Solution for payroll, with the option to work with any finance platform the City of Key West may transition to in the future. NeoGov and Paylocity do not currently have a solution for interfacing with our current payroll system and require the use of their platform's payroll system within the first year of the contract.

Oracle was also the only host that provided a partner quote for the implementation including the extraction and conversion of all personnel data from Naviline and One Solution.

#### **Procurement**

In the Commission approved FY2023-2024 budget, the Human Resources department allocated \$55,000.00 for a Human Resources Information Management System in account 001-1302-513-5400, for Year One of the subscription cost. Implementation costs in the amount of \$228,998 were not previously budgeted, however the Finance Department has determined the expense to be eligible for ARPA funding and a budget amendment using ARPA funding will be completed.

#### **Recommendation**

The City Manager's Office recommends authorizing the purchase of a Human Capital Management platform and implementation from Oracle and Fourthsquare for \$268,998.00 without formal competitive procurement under Sect 2-797 (4) Exempt Contractual Services, in the best interest of the City, with funding identified from ARPA funds by Finance authorizing any necessary budget transfers.

Exhibits:

Oracle & Fourth Square Proposal  
Paylocity Proposal  
Neogov Proposal

# Investment Summary

October 5, 2023 | Quote # Q-129682 | Quote valid for 30 days



**Client Company**  
**City of Key West**  
 1300 White St  
 Key West, FL 33040  
 305-809-3700 X3716: HR x3822 Finance

**Client Contact**  
**Bridget Flores**  
 1300 White Street  
 Key West, FL 33040  
 3058093716

 **Total Employee Count**  
 512

 **Monthly Fee**  
 \$3,901.58

 **One-Time Fees**  
 \$6,502.00

 **Total Annual Investment**  
 \$50,733.96

*\*Total Annual Investment Includes estimated annual fees  
 \*Annualized fees do not include usage based fees  
 \*Monthly fees based on # of active employees  
 \*\*Plus sales tax if applicable*

See following pages for line item breakdown of services

<b>Paylocity Account Executive</b>	<b>Date</b>
 <i>Signature</i>	

Chris McDonald

<b>Client Authorization</b>	<b>Date</b>
 <i>Signature</i>	
 <i>Name (Print)</i>	

The Paylocity services covered by this order are provided in accordance with the terms and conditions of the applicable Paylocity subscription agreement and any additional terms specified below.

## National Awards & Recognition



# Investment Summary

October 5, 2023 | Quote # Q-129682 | Quote valid for 30 days



One-Time Fees	Qty	Rate	Price
<b>HCM Bundle</b>			<b>\$6,502.00</b>
Payroll Implementation	-	-	Included
General Ledger Implementation	-	-	Included
Human Resources Implementation	-	-	Included
Time Off Implementation	-	-	Included
Self-Service Portal Implementation	-	-	Included
		<b>One-Time Total</b>	<b>\$6,502.00</b>

Monthly Fees	Base	Qty	Rate	Monthly
<b>HCM Bundle</b>	<b>\$92.30</b>	<b>512</b>	<b>\$7.44</b>	<b>\$3,901.58</b>
<b>Payroll</b>				
• Payroll Processing	-	-	-	Included
• Unlimited Payroll Runs	-	-	-	Included
• Tax Filing Services	-	-	-	Included
• New Hire Reporting	-	-	-	Included
• Geolocation Taxation	-	-	-	Included
• Prorated & Retro Pay	-	-	-	Included
• General Ledger Service	-	-	-	Included
• Signed & Sealed Checks	-	-	-	Included
• Direct Deposit	-	-	-	Included
• On Demand Payment	-	-	-	Included
<b>Human Resources</b>				
• Human Resources Management	-	-	-	Included
• Workflows Process Automation	-	-	-	Included
• Centralized Document Library	-	-	-	Included
• Employee Action Forms	-	-	-	Included
• Employee Self-Service	-	-	-	Included
• Position Management	-	-	-	Included
• Skills & Certifications Management	-	-	-	Included
• Time Off Management	-	-	-	Included
• Employment Verification	-	-	-	Included
<b>Talent</b>				
• Recruiting	-	-	-	Included
• Onboarding	-	-	-	Included
• Performance Management	-	-	-	Included
<b>Employee Experience</b>				
• Community +	-	-	-	Included
• Recognition	-	-	-	Included
• Mobile App	-	-	-	Included
<b>HR Reporting &amp; Insights</b>				
• Data Insights	-	-	-	Included
• Dynamic Reporting	-	-	-	Included
• Modern Workforce Index	-	-	-	Included
<b>Customer Service</b>				
• Dedicated Account Management	-	-	-	Included

# Investment Summary

October 5, 2023 | Quote # Q-129682 | Quote valid for 30 days



• On Demand Training (PEAK)	-	-	-	Included
• Unlimited Product Training	-	-	-	Included
			Monthly Total	<b>\$3,901.58</b>

\*There is no fee to the company for On Demand Payment, except in the event that the company wants to cover the employee's transaction cost of \$1.25 per transaction. Other limitations apply.

Annual Fees	Base	Qty	Rate	Annual
W2 / 1099	\$50.00	512	\$7.00	\$3,634.00
Annual SSN Verification	\$25.00	512	\$0.50	\$281.00
			Annual Total	<b>\$3,915.00</b>

Usage-Based Fees	Base	Rate
Electronic Garnishments		\$1.80
Direct Agency Pay		\$2.85
Delivery Next Day (UPS)		\$20.00
Split Pack		\$6.00

The fees listed above are invoiced as incurred on per usage basis in accordance with the terms and conditions of the service agreement. These fees are in addition to the ongoing fees stated in the Investment Summary section of the quote.

DRAFT





**Exhibit A**  
**Order Form**

# NEOGOV

NEOGOV

Customer:

Governmentjobs.com, Inc. (dba "NEOGOV")  
2120 Park Pl, Suite 100  
El Segundo, CA 90245  
United States  
billing@neogov.com  
Sales Rep: Vincent VanAuker

Key West, City of (FL)  
1300 White St  
Key West, FL 33040  
USA

Quote Valid From: 12/11/2023  
Quote Valid To: 1/31/2024

Quote Number: Q-13850  
Payment Terms: Annual, Net 30  
Subscription Term in Months: 48

Employee Count: 488  
Order Summary

Year 1

Service Description	Type	Start Date	End Date	Term Price (USD)
Custom Bundle	RECURRING			\$33,366.50
Includes Insight License, Onboard License, Perform License, Core HR License,				
Custom Bundle Setup and Training	ONE-TIME			\$20,000.00
<b>Year 1 TOTAL:</b>				<b>\$53,366.50</b>

Year 2

Service Description	Type	Start Date	End Date	Term Price (USD)
Custom Bundle	RECURRING			\$50,049.75
Includes Insight License, Onboard License, Perform License, Core HR License,				
<b>Year 2 TOTAL:</b>				<b>\$50,049.75</b>

Year 3

Service Description	Type	Start Date	End Date	Term Price (USD)
Custom Bundle Includes Insight License, Onboard License, Perform License, Core HR License,	RECURRING			\$70,069.65
<b>Year 3 TOTAL:</b>				<b>\$70,069.65</b>

Year 4

Service Description	Type	Start Date	End Date	Term Price (USD)
Custom Bundle Includes Insight License, Onboard License, Perform License, Core HR License,	RECURRING			\$73,406.30
<b>Year 4 TOTAL:</b>				<b>\$73,406.30</b>

**ORDER TOTAL (USD) :**

**\$246,892.20**

**DRAFT**

**A. Terms and Conditions**

1. **Agreement.** This Ordering Document and the Services purchased herein are expressly conditioned upon the acceptance by Customer of the terms of the NEOGOV Services Agreement either affixed hereto or the version most recently published prior to execution of this Ordering Form available at <https://www.neogov.com/service-specifications>. Unless otherwise stated, all capitalized terms used but not defined in this Order Form shall have the meanings given to them in the NEOGOV Services Agreement.
2. **Effectiveness & Modification.** Neither Customer nor NEOGOV will be bound by this Ordering Document until it has been signed by its authorized representative (the "Effective Date"). Unless otherwise stated in this Ordering Document, all SaaS Subscriptions shall commence on the Effective Date. This Ordering Document may not be modified or amended except through a written instrument signed by the parties.
3. **Summary of Fees.** Listed above is a summary of Fees under this Order. Once placed, your order shall be non-cancelable and the sums paid nonrefundable, except as provided in the Agreement.
4. **Order of Precedence.** This Ordering Document shall take precedence in the event of direct conflict with the Services Agreement, applicable Schedules, and Service Specifications.

**B. Special Conditions (if any).**

**"Key West, City of  
(FL)"**

Signature:

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Print Name:

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Date:

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**QUOTATION**

**Valid through** 29-FEB-2024

<b>Partner Name</b>	FourthSquare, LLC	<b>Partner Contact</b>	Kerry Boudreaux
<b>Partner Address</b>	300 Decker Dr., Suite 335 Irving TX 75062	<b>Phone Number</b>	859-492-2829
		<b>Email Address</b>	kerry.boudreaux@fourthsquare.com
<b>End User Name</b>	City of Key West	<b>End User Technical Contact</b>	Bridget Flores
<b>End User Address</b>	1300 White St KEY WEST FL 33040	<b>Phone Number</b>	305-809-3714
		<b>Email Address</b>	bridget.flores@cityofkeywest-fl.gov

All fees on this Budgetary Quote are in **USD**

**New Subscription**

Service Period: 48 months					
Cloud Services	Data Center Region	Quantity	Term	Unit Net Price	Net Fee
B85800 - Oracle Fusion Human Capital Management Base Cloud Service - Hosted Employee	NORTH AMERICA	525	48 mo	4.14	104,347.83
B87675 - Oracle Fusion Recruiting Cloud Service - Hosted Employee	NORTH AMERICA	525	48 mo	2.21	55,652.17
<b>Subtotal</b>					160,000.00

Fee Description	Net Fee
Cloud Services Fees	160,000.00
<b>Total Fees</b>	160,000.00

This pricing example is provided for evaluation purposes. This quote is intended to further our discussions, it is not eligible for acceptance by you and is not a part of a binding contract between us for the products and/or services specified. User minimums and licensing rules may apply to the products specified. If you would like to purchase the products and/or services specified in this draft quotation, please ask Oracle to issue you a formal Quote (which may include an Oracle agreement if you do not already have an agreement with Oracle) for your acceptance and execution and return to Oracle. Your order will be effective only upon Oracle's acceptance of the formal Quote (and the Oracle agreement, if required).

### Estimated Subscription Start 7-Dec 2023

**Estimated Annual SaaS Spend by Subscription Year**

Year 1	40,082.14
Year 2	39,972.62
Year 3	39,972.62
Year 4	39,972.62
<b>Total</b>	<b>160,000.00</b>



CITY OF   
**KEY WEST FLORIDA**



ORACLE | Partner

**Implementation Services for  
ORACLE HCM CLOUD SOFTWARE  
Recruiting, Onboarding, and Self-Service**

Presented by FourthSquare

December 6, 2023





# Company Overview

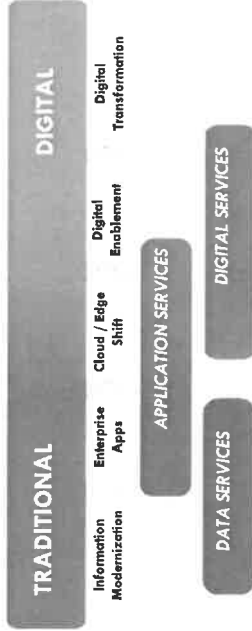
- Why FourthSquare?
- Boutique Global Company
- Service Offerings
- Partial Customer List
- Oracle Cloud for Public Sector Customers



# FourthSquare – Boutique Global Company

“A trusted, reliable and flexible IT consulting firm built around core values and culture. Our passion at FourthSquare is to build a great company to serve our clients 360° needs while creating value in everything we do.”

## Helping Customer in their Digital Journey



## Business Highlights

- **Global:** Global Boutique Partner; Multiple Partnerships
- **Customer Focus:** Global Customers & Global Delivery Model
- **Referenceable:** 100% referenceable customers; repeat customers
- **Public Sector:** 50% of the deals coming from Public Sector with 100+ opportunities
- **Offerings:** Applications, Infrastructure, Data and Digital
- **Team:** Pyramid Model; Pre-Sales ready for all towers; 100+ Consultants on projects
- **Industry:** Public Sector, Manufacturing, Healthcare, Retail, Finance and Utilities
- **DNA:** 360° View, Flexible, Integrity, Trust, cultural alignment
- **Business Advantage:** Minority Owned; WBE and VBE potential;
- **Community Development:** FourthSquare C.A.R.E.S; **Hiring our Heroes**



**Successful**  
IT Consulting Company  
**Consistent**  
Revenue Growth & Profitability  
**Proven**  
7 Year Track Record  
**3X**  
Projected Revenue in 2023

Global Footprint

USA    India    Costa Rica    UAE    Canada

## FourthSquare By the Numbers (all customers)

Enterprise Clients Served	Enterprise Application Projects	Cloud Implementation Worldwide	Application Managed Services	Years of Service
110+	320+	40+	25+	7

# Our Service Offerings

## Service Towers

- Oracle Fusion Cloud
- Oracle EBS
- PeopleSoft
- JDE
- Hyperion / EPM
- Salesforce




**Applications**

- Cloud: OCI, Azure, AWS
- Exadata (CS), PCA, PCCS
- Platform, OIC
- Migrations
- Integrations
- Security
- Networking




**Infrastructure**

- BI & Analytics
- Datawarehouse Solutions
- Data Lakes
- Data Science
- OBI, OAS, ADW, OAC
- Tableau, Power BI
- Snowflake



**Data**


- UI/UX
- Mobile Applications
- Application Modernization
- Devops; Securities
- Testing Services
- IoT, Blockchain and Bots
- Automation, AI and ML



**Digital**


## Shared Services

- Management Consulting
- ERP Assessments
- Project Management
- Change Management



**Advisory**

- Application Services
- Cloud Services
- Database Services
- Hybrid (Extended) Services




**Managed Services**

- Innovation Center
- R&D and Accelerators
- New Release Readiness
- POCs and Demos



**Centre of Excellence**

- Strategic Staffing
- Contract Staffing
- Contract to Hire
- Onsite/Offshore



**Talent**

# Oracle Fusion Cloud Apps Capabilities

Financial	SCM	HCM	EPM
<ul style="list-style-type: none"> <li>Financials CS</li> <li>Accounting Hub</li> <li>Revenue Management CS</li> <li>Project Financial Management</li> <li>Project Portfolio Management</li> <li>Grants</li> <li>Invoice Scanning</li> </ul>	<ul style="list-style-type: none"> <li>Procurement &amp; Contracts</li> <li>Supplier Portal</li> <li>Order Management</li> <li>Cost Management</li> <li>Inventory &amp; Manufacturing</li> <li>VCP, VCE, OTM, Demantra</li> <li>Product Data Management</li> </ul>	<ul style="list-style-type: none"> <li>Core HR, Benefits, Absence</li> <li>Talent Acquisition</li> <li>Payroll &amp; Time and Labor</li> <li>Talent Management</li> <li>Workforce Compensation</li> <li>Workforce Planning</li> <li>Helpdesk &amp; Health &amp; Safety</li> </ul>	<ul style="list-style-type: none"> <li>Planning and Budgeting</li> <li>Enterprise Data Management</li> <li>Performance Reporting</li> <li>Enterprise Planning</li> <li>Financial Consolidation and close</li> <li>Account Reconciliation</li> <li>Workforce Planning</li> </ul>
Advisory and Assessment			
Rapid Implementation, Starter Packages, Innovations			
Managed Services			
Analytics			

# Relevant Customer List

## Customers with Oracle HCM Solution



## Public Sector Customers



valley  
regional  
transit



Dedicated to Excellence  
Cherry Creek Schools



Shaping our future



# Partial Customer List

**Manufacturing**

**Financial**

**Public Sector**

**Education**

**Healthcare**

**Energy**

**Telecom**

**Technology**

**Other**

**Partners**

**Deloitte.**

**Zensar**

# Growing community of State, Local & K12 Districts

22 state & state agencies

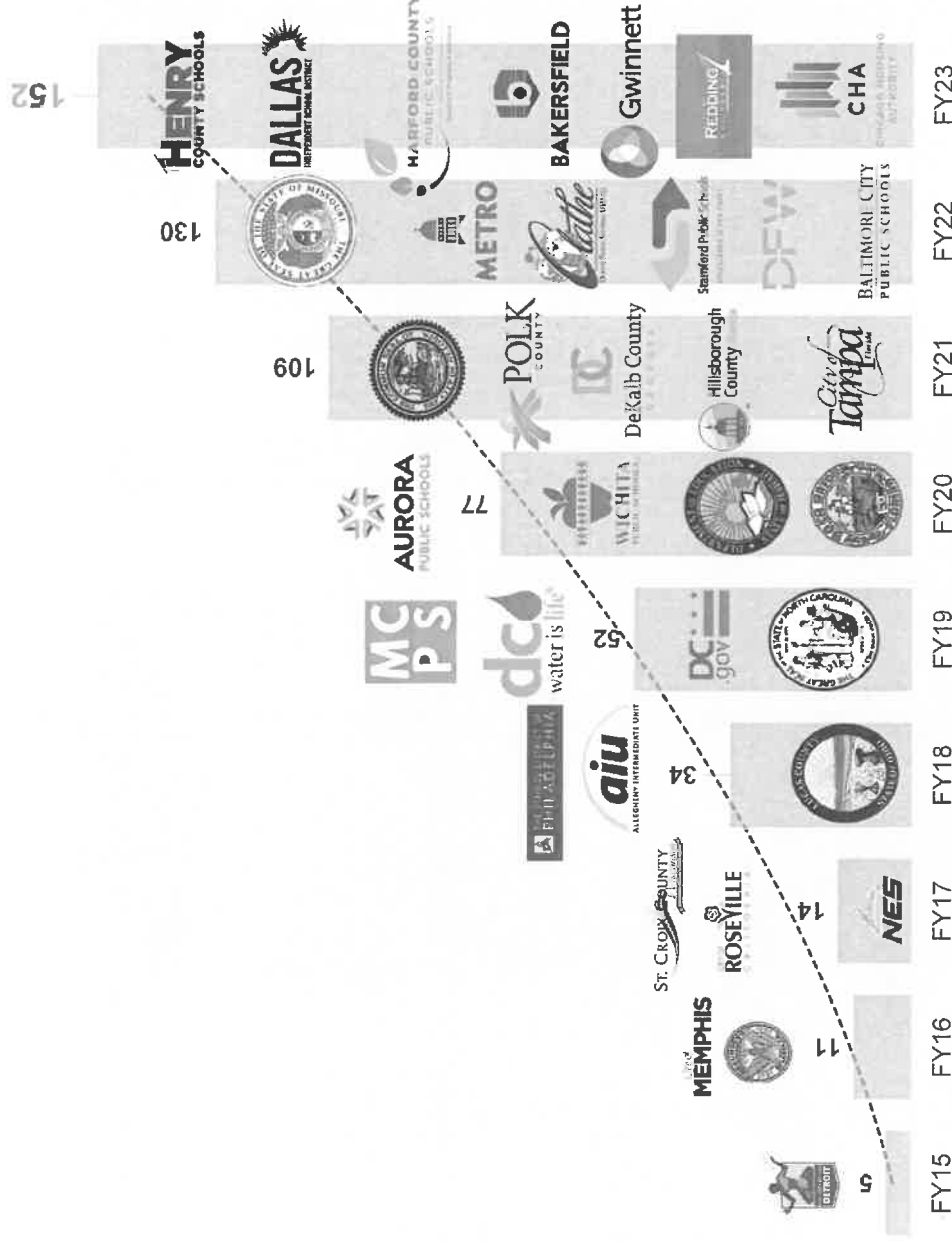
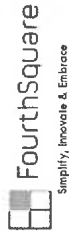
24 k-12 school districts

104 local governments

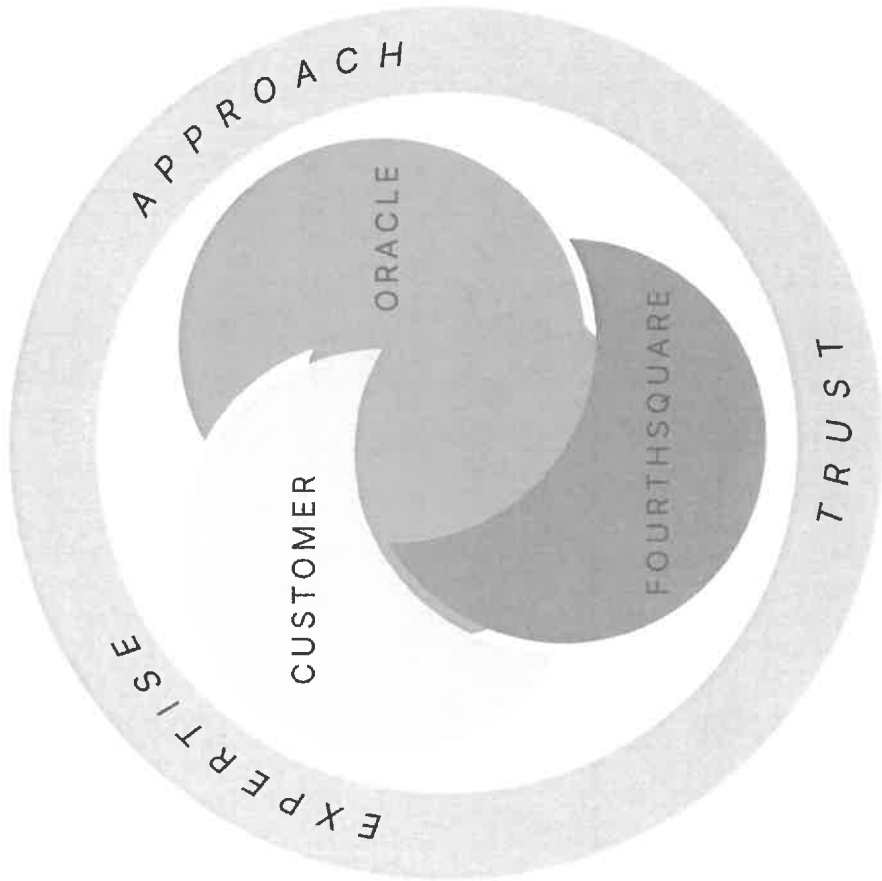
150+ public sector customers

Oracle has 45+ years of helping customers manage the world's most important data

> 400K customers trust Oracle to help run their businesses



# Why FourthSquare?







# Implementation Approach

- Implementation Approach
- Project Scope Footprint
- Project Scope Details
- Proposed Timeline



# Project Overview

The city of Key West is seeking a modern integrated secure HCM Software which will resolve the current recruiting, onboarding and core HR limitations and challenges. Key West desires a single solution that meets the needs of a variety of departments and operational needs to streamline data entry, workflow, reporting, and process completion. It need to address disparate systems that do not synchronize data, align workflows, and result in silos of data making reporting difficult. The city is looking to decrease administrative and clerical work while ensuring accurate and timely hiring, onboarding, and pay.

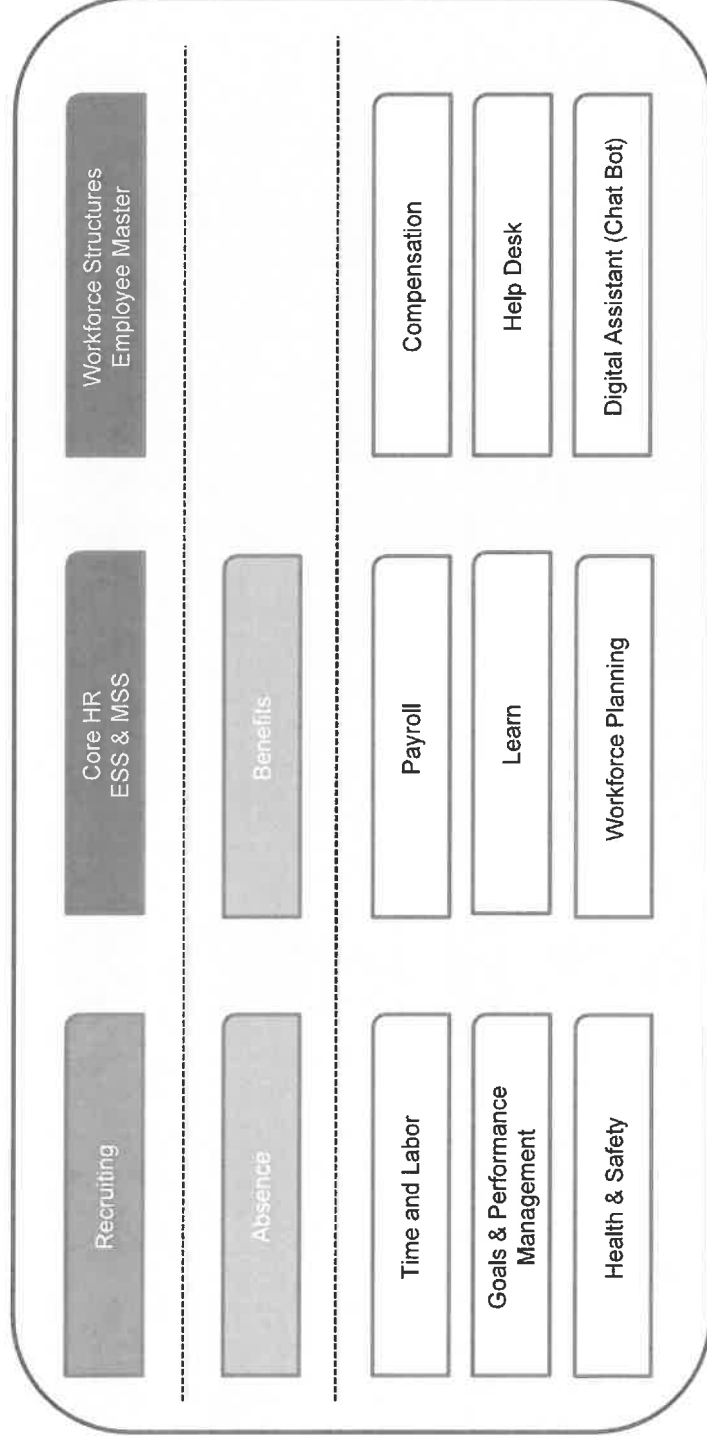
## Required Functionality:





- Implement Oracle Recruiting and Onboarding
- Implement Oracle HCM Cloud foundation
  - Migrate initial HR workforce structure data
  - Integrate with Core HR data with exiting HR system (CentralSquare)
- CentralSquare is currently used for HR & Payroll functions

## Proposed landscape:

- Oracle Fusion HCM Cloud foundation with Recruiting and Onboarding solution

# HCM Cloud Scope (Proposed Option)



-  Implement full functionality
-  Implement Base functionality (HCM Foundation)
-  Included in the base license – not in scope
-  Additional HCM Cloud modules - included for reference – not in scope

# Detailed Project Scope

Scope Details	
Technology	<ul style="list-style-type: none"> <li>Oracle Cloud HCM Applications (Core HR Foundation &amp; Oracle Recruiting Cloud)</li> </ul>
Languages	<ul style="list-style-type: none"> <li>Implementation will be in English</li> </ul>
Geographies	<ul style="list-style-type: none"> <li>City of Key West</li> </ul>
Technical Scope	<ul style="list-style-type: none"> <li>Oracle Integration with existing ERP system for HR records</li> <li>Out of the box reporting; 5 Custom Reports included in the estimate</li> <li>SSO &amp; Multi-Factor Authentication</li> </ul>
Project Management	<ul style="list-style-type: none"> <li>Complete project management setup and governance for a successful project</li> <li>Change Management Advisory (Optional)</li> </ul>
Testing	<ul style="list-style-type: none"> <li>3 rounds of Application Testing; CRP, IAT, UAT</li> </ul>
Training	<ul style="list-style-type: none"> <li>Train-the-Trainer</li> </ul>
Environment	<ul style="list-style-type: none"> <li>Environment Strategy and Plan</li> </ul>
Security	<ul style="list-style-type: none"> <li>Security Design; Role based user security configuration</li> </ul>
Support	<ul style="list-style-type: none"> <li>3-Month support included</li> </ul>

# Proposed Timeline



Project Timeline	Weeks =>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	M1	M2	M3
<b>Define</b>	Project Planning & Change Management																							
	Review Current Business Processes, Design and Data																							
	Map delivered Business Process Models to Client processes																							
	Configure PILOT environment																							
	PILOT - Solution Confirmation																							
	Solution Design Sign-Off																							
<b>Build</b>	Data Mapping & Integrations																							
	Reports Development																							
	Create Test Scripts																							
	Configure IAT Environment																							
	Iterative Application Testing (IAT)																							
	Application Config Reviews & sign-off																							
	Training Content Development																							
<b>Validate</b>	Train-the Trainer (TTT)																							
	End User Training																							
	Configure UAT																							
	User Acceptance Testing (UAT)																							
	Issue Resolution & Go-NOGO																							
<b>Transition</b>	Support Plan & Confirm																							
	Transition Plan & Confirm																							
	Cutover Execution																							
	Go-Live & Hyper Care																							
<b>Realization</b>	Improvements & Ongoing Support Plan																							
	Lessons Learnt & Project Close																							
																							2.5 Months	



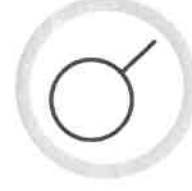
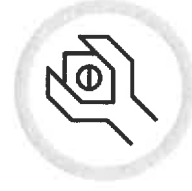
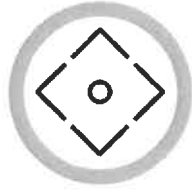
# Implementation Methodology

- Accelerated Cloud
- Implementation Starter Pack
- Traceability Matrix
- QA Approach & Iterative Application Testing
- Cloud Success Mantra



# Implementation Methodology

Accelerated Cloud *(aligned to OUM)*



## DEFINE

- Project & Change Management
- Governance Structure
- Requirements Mapping
- **Conference Room Pilot (CRP)**
- Data Conversion Design
- Integration & Reports Design
- Solution Design

## BUILD

- Data Conversion Mapping
- Tech Development
- Security Definitions
- **Build Test Scripts**
- **Iterative Application Testing**
- Training Development
- Support Plan

## VERIFY

- Confirm Configurations
- Validate Conversions
- **Train-the Trainer**
- **End User Training**
- **User Testing (UAT)**
- Parallel Test (if applicable)
- Readiness Matrix (OCM)

## TRANSITION

- Finalize Support Plan
- Transition Plan
- Finalize Cutover Plan
- **Cutover Execution**
- **Controlled Entry**
- Go – Live
- Hypercare Support

## REALIZATION

- Resolve Go-Live issues
- Setup support organization
- Provide support to users
- Document lessons learned
- Identify areas of improvement
- Ongoing Support
- Close project



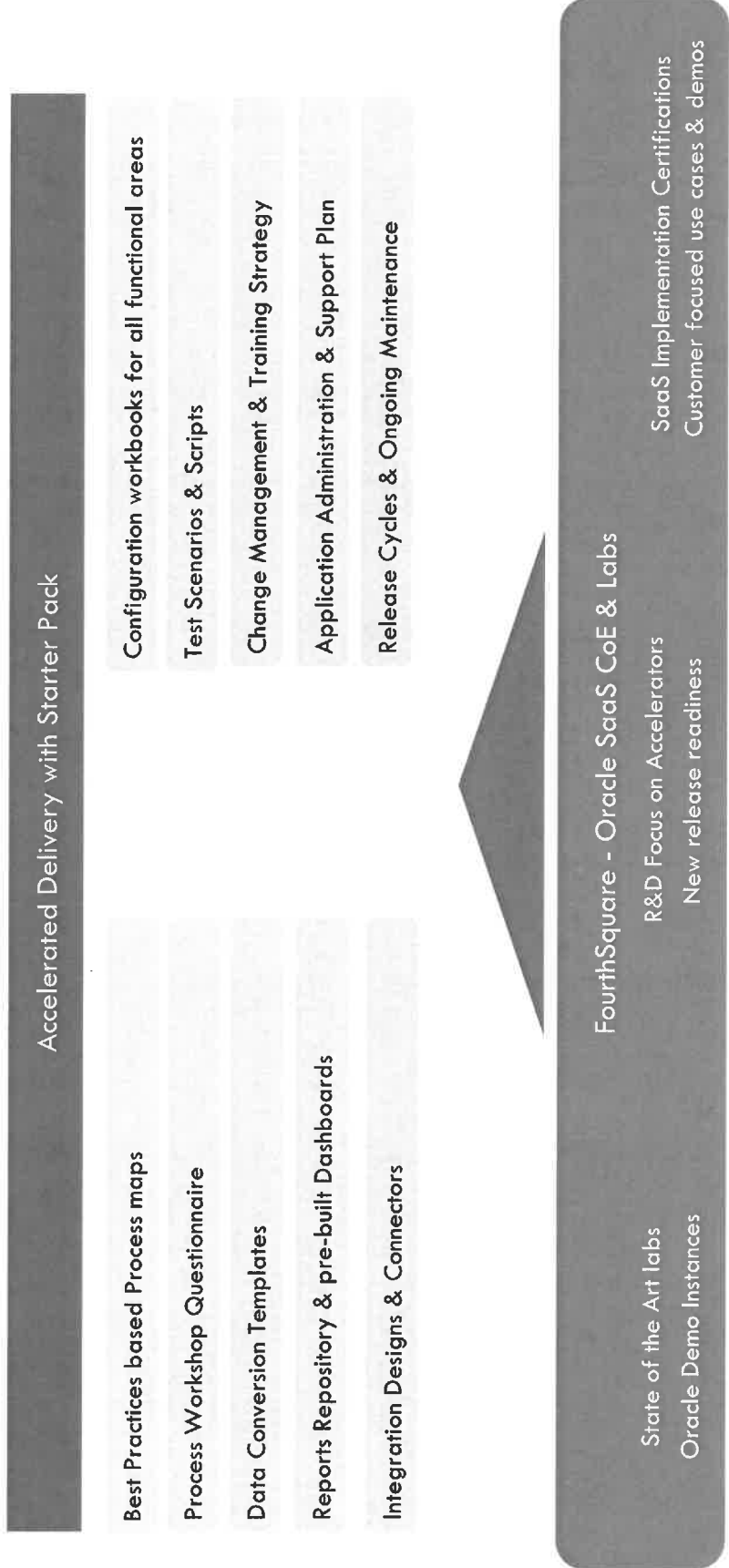
Project Management

Knowledge Transfer

Change Management

# Implementation Methodology

## Implementation Starter Pack

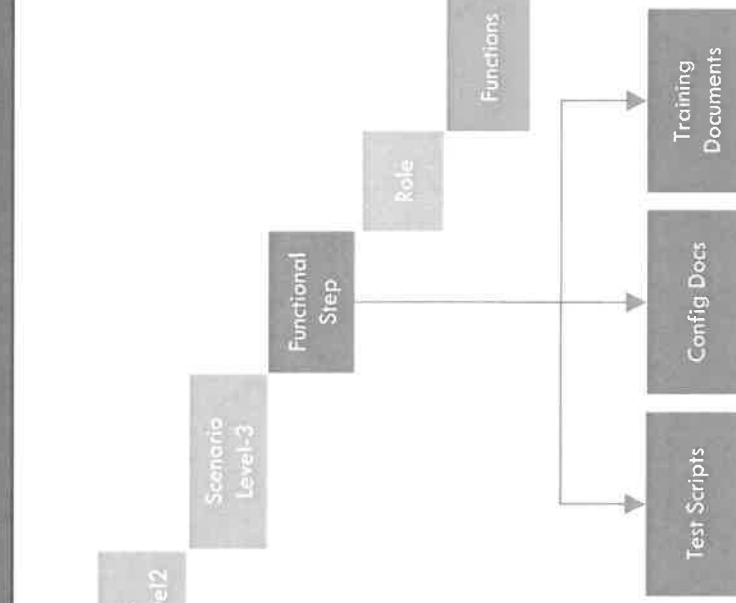




# Implementation Methodology

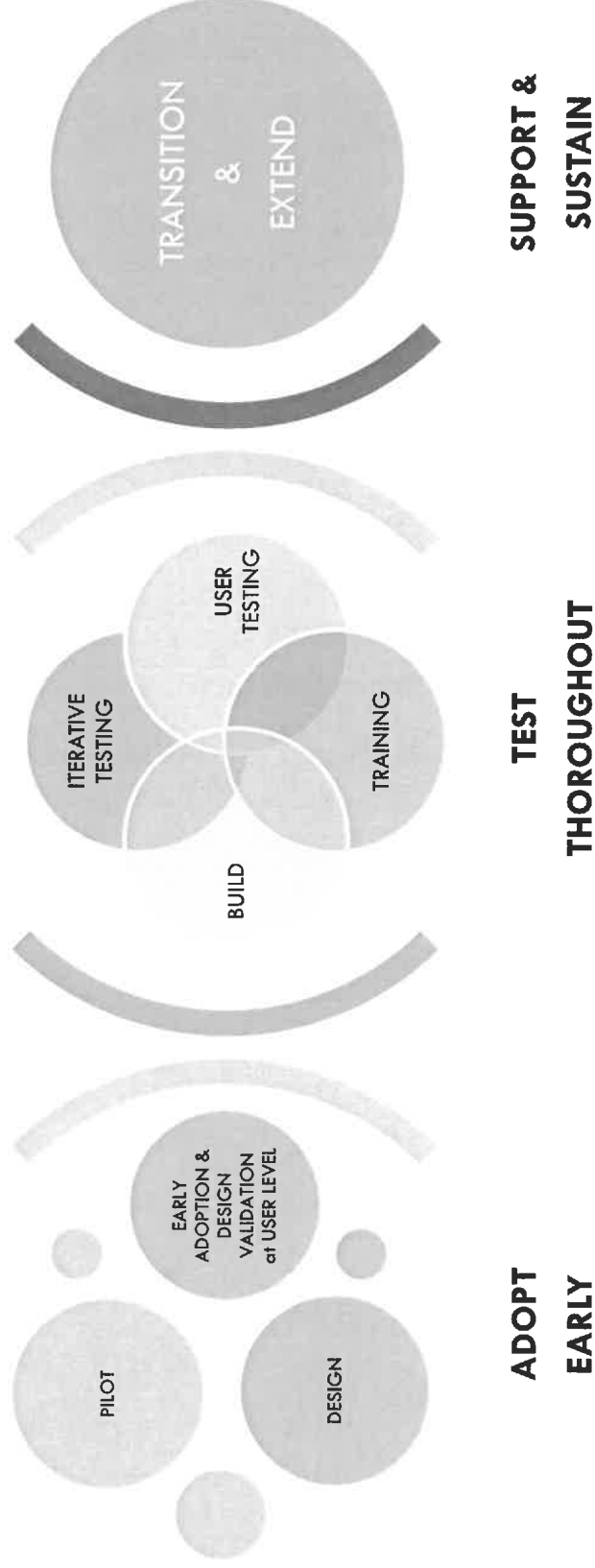
## Traceability Matrix

Solution Objectives		Requirement Traceability Matrix			Example	Level Wise Deliverables
Requirements	Requirements				Customer Specific Requirements	
Business Process Listing (L1, L2, L3)	Business Process Level2	Business Process Level3	Scenario Level-3	Functional Step	Employee Onboarding	Design Test Script Training
Test Scripts / Training Documents				Role	Create a New Hire	Design Test Script Training
Role Based Training					Enter Personal Details	Config Test Script Training
Security – Role based access					HR Admin	Role Based Training Role Based Access Control



# Implementation Methodology

## Cloud Implementation Success Mantra



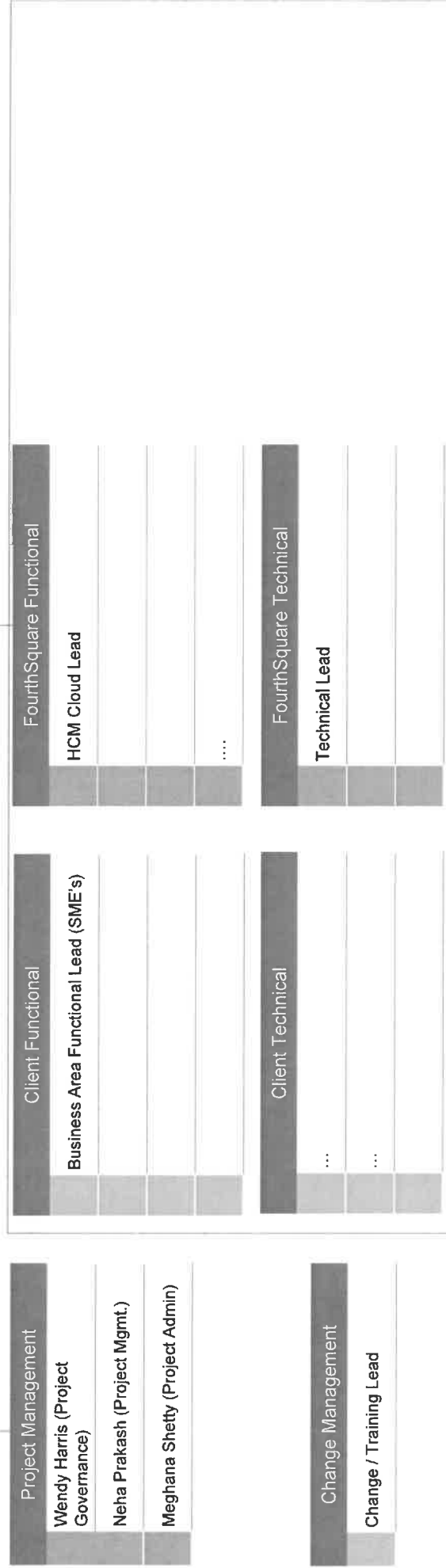


## Project Governance

- Project Team
- Organization Structure
- Project Meeting Cadence
- Resource Allocation

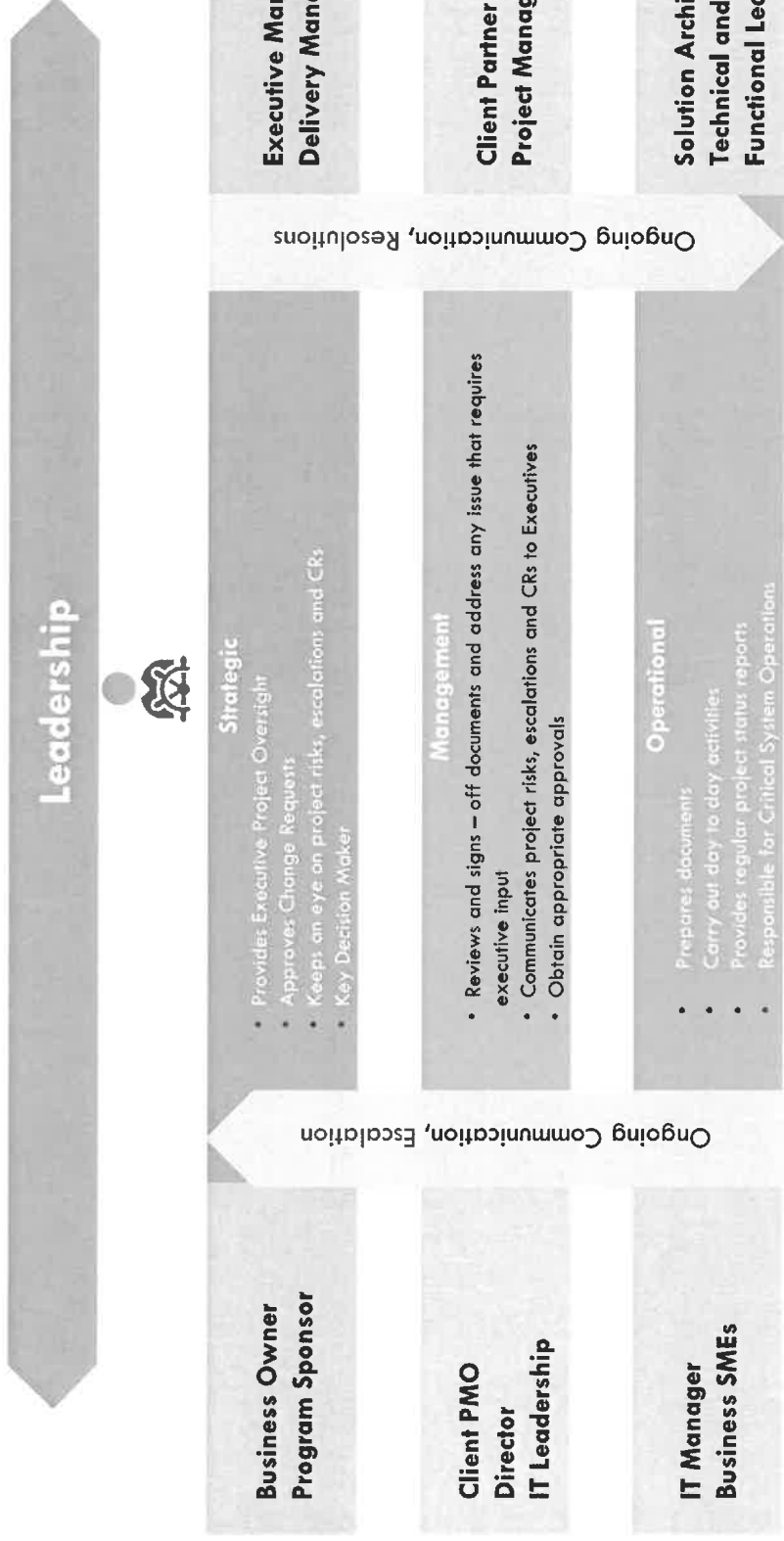


# Project Governance Organization Structure (Example)



❖ Typical FourthSquare project teams include the following resources; based on the scope of the project: Project Manager, Application Leads, Application Generalists, Technical Development, Change Management  
 ❖ Detailed Org structure and resource plan will be determined during Define Phase

# Project Governance Reporting & Escalation Methodology



# Project Governance

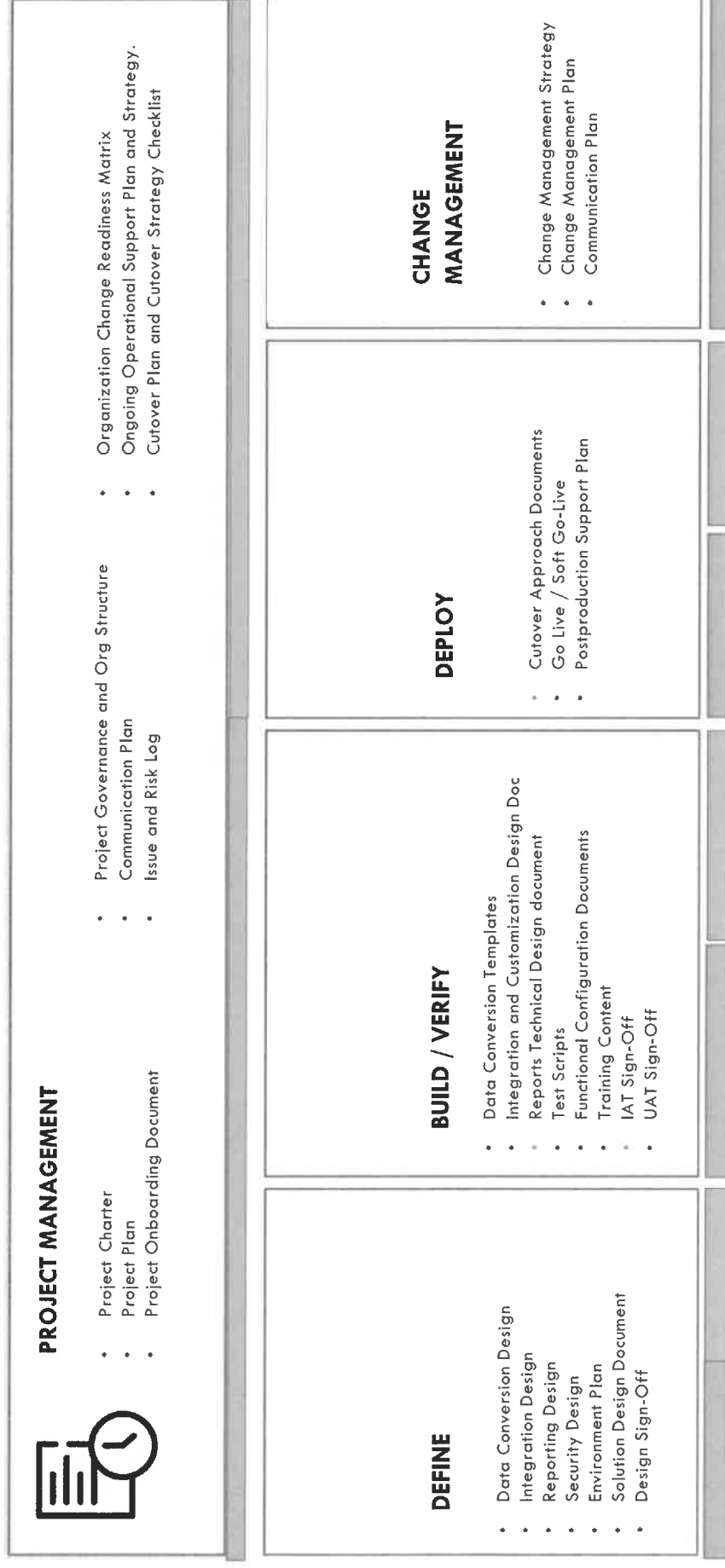
## Project Meeting Cadence (Recommended)

Communication	Frequency	Audience
Steering Committee Meetings	Monthly (or more frequently as needed)	Steering Committee
Project Progress Meeting – Executive Summary – Status Reports (roll-ups) – Key Issues, Challenges & Decisions	Weekly	PMO, Key Stakeholders
Issues & Decisions Review Meeting	Weekly	SMEs, SAs, BAs, FourthSquare Team
Stand-up Project Meetings	Daily (build phase or later)	SMEs, SAs, BAs, FourthSquare Team
Project Management Plan	Daily	PMO
TEAMS Project Site Updates	Daily	All Project participants
Ad-Hoc Meetings (e.g., particular workstream or an issue resolution)	On-Demand	On-Demand

Note: Meeting minutes will be stored in TEAMS Project Site

# Project Governance

## Project Deliverables (Typical – all may not apply)





## Project Cost

- Cost Estimate
- Assumptions





# Cost Estimate



## Project Summary:

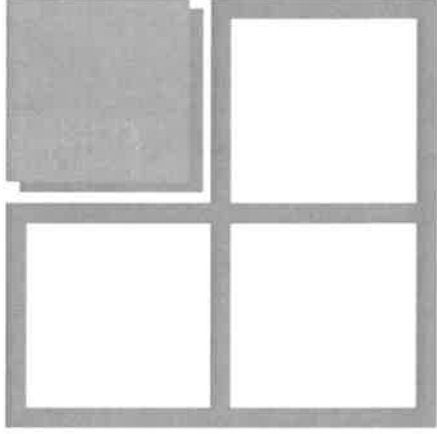
- Implement Oracle Recruiting Cloud (ORC) with Core HCM Cloud foundation
- Convert and sync data with current ERP/HCM solution (CentralSquare)
- Time to Implement: 4.5 months plus 3-month support

## Cost Estimate:

- Implementation Cost of the project including Support for the timeline: \$228,998

## Key Assumptions:

- Project will be delivered on a Fixed fee basis
- FourthSquare will provide a project manager for end-to-end execution
- Certified and qualified resources with suitable experience will be assigned



# FourthSquare

Boutique Global Company  
Irving TX