



City of Corona Scope of Work

**For the Implementation of:
CIS v5**

November 21, 2023

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Introduction

The project is defined as the upgrade of Infinity CIS, by Advanced Utility Systems (“Advanced”) for City of Corona (“Corona”). The current CIS Infinity Version 3 (“v3”) instance will be upgraded to Infinity CIS Version 5 (“v5”) and will replace the current version of Infinity CIS, Advanced’s comprehensive customer information and utility billing software.

This document describes the Scope of Work (“SOW”) to be delivered by Advanced, as well as defines the principal activities and deliverables of both Advanced and Corona for this project.

The project as outlined in this Scope of Work (“SOW”) encompasses all aspects of Corona’s Infinity CIS upgrade, including but not limited to project management, requirements gathering, data integrity and clean up, data conversion, configuration including interfaces, and training.

Corona Points of Contact

Primary Point of Contact (POC):

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Organization	City of Corona
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Organization	City of Corona
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Project Scope

Advanced and Corona agree to cooperatively manage the cost, schedule, and scope of the project. Project scope is limited to the tasks and deliverables identified in this SOW and responses to the functional requirements attached to this document. Items not included in this SOW and its appendices are to be considered out of scope.

Advanced will provide the following services in regards to the Infinity CIS to Corona:

- Project Management
- Discovery Workshops (Functional, Interface and Modifications, Reports and Bill Print)
- Conversion and Migration of 5 years of data from CIS Infinity Version 3 to Infinity CIS Version 5 (limited to 5 years of history)
- V3 Data Integrity Check and Clean up in Corona's upgrade environment
- Data refreshes (Initial, Functional, ITC1, UAT, Go-Live)
- Conversion of current Bill Print(s)/Notice(s)/Receipts formats from Crystal Reports XI to Crystal Reports 2013 (as identified via the Discovery Session)
- Conversion of Standard canned reports and custom Advanced created reports format from Crystal Reports XI to Crystal Reports 2013 (as identified via the Discovery Session)
- Remote web based Core Team Training
- Remote or optional onsite web based End User Training
- Conversion of interfaces as identified in Task 2
- Conversion of existing standard Reports that are part of Infinity CIS V3
- Conversion of required billing formulas
- Technical Support
- Hosting Infinity CIS in a Infinity Cloud environment
- 5 Additional Infinity CIS Licenses
- REST API

Definitions

Name	Definition
Baseline Accounts	A cross selection of accounts types and services that are used for testing purposes the CIS Solution
BRD	Business Requirements Document created by Advanced that defines the requirements for software modification(s) and non-configurable interfaces required by Corona.
CIS	Customer Information and billing System.
Infinity CIS	The Advanced Customer Information and billing System.
CIS Solution	All Advanced licensed software (Infinity CIS) and related implementation services.
Corona Owned Control Forms	Configuration areas of the system that are the responsibility of the Corona (including but not limited to service orders, actions, letters, security, admin).
Configuration	Changes to the software that do not require source code or structural data model changes.
Core Team Training	Instructor led training delivered remotely by Advanced to the identified Project Team members of Corona on the generic CIS Solution
Defect - High	<p>A code or configuration defect that makes a component of the CIS Solution unusable or inoperable. This error is a loss of the capability of the CIS Solution to perform an important business function.</p> <p>High defects include: (i) loss of the capability of the CIS Solution to perform an important business function; (ii) a workaround does not exist, and testing this function cannot be performed until the problem has been corrected.</p>
Defect - Medium	A code or configuration defect that significantly limits the CIS Solution's ability to conform to the documentation. This limitation stops the user from performing the normal use of the CIS Solution; however, a mutually agreed upon workaround does exist. Testing can continue on a module of the CIS Solution with a workaround.
Defect - Low	A code or configuration defect that limits the capability of the CIS Solution, but is cosmetic or minor in nature. There is a practical workaround or the defect does not impact Corona's operation of the CIS Solution in any significant respect.
End User Training	Instructor led (remotely) of the CIS Solution delivered by Advanced in coordination with the Corona Core Team to Corona employee base utilizing specific areas of the system.
Modification	A change to the code base or a structural data model change.
CIS Infinity V3	Corona's current customer information and billing system to be replaced by Infinity CIS.

Roles and Responsibilities

The roles and responsibilities are summarized below and further detailed by task and subtask in Appendix B – Table of Responsibilities (Deliverables).

Advanced Responsibilities:

1. Advanced will maintain project communications with Corona's Project Manager.
2. Advanced will manage the efforts of the Advanced staff and coordinate Advanced activities with the Corona's Project Manager.
3. Advanced will conduct regular (e.g. weekly or as required) telephone status report conversations with the Corona's Project Manager.
4. Advanced will participate in weekly reviews with Corona's project team. Participation can be waived by mutual agreement.
5. Advanced will provide timely responses to critical issues raised by Corona's Project Manager.
6. Advanced will prepare and submit a status report that includes: the accomplishments of the previous month, activities planned for the current month and an update to the Project Schedule in Smartsheet format, as well as an update to the action item list.
7. Advanced will prepare and submit project change proposals to Corona's Project Manager as necessary.
8. Advanced will resolve deviations from the Project Schedule.
9. Advanced will monitor the project to ensure that support resources are available as scheduled.
10. Advanced will coordinate and oversee the installation of all Advanced licensed software.
11. Advanced will install all Advanced licensed software in one (1) production and one (1) test instance in the Advanced Infinity Cloud Platform and will support the production environment throughout the implementation and both environment after implementation and go live.
12. Advanced will coordinate and oversee the implementation efforts of all modifications and interfaces identified in this SOW (exclusive to the Infinity CIS side of the interface).
13. Advanced will monitor and support all testing phases, i.e., functional, integrated, and User Acceptance Testing. Application consultants will be available to answer questions and resolve issues generated during testing.

Corona Responsibilities:

1. Corona will provide the relevant data and information in order for Advanced to convert and configure into the new version of the CIS Solution.
2. Corona will establish a Project Team that is representative of the operational areas that will be affected by this project.
3. Corona will designate a Project Manager who will manage the efforts of CoronaProject Team and/or staff and coordinate activities with the Advanced's Project Manager.
4. Corona's Project Manager must ensure that Corona's personnel have the time, resources, and expertise to carry out their respective tasks and responsibilities.
5. Corona's Project Manager or designee will participate in the scheduled (e.g. weekly or as required) status meetings with the Advanced's Project Manager.
6. Corona will review current business practices, consider and/or adopt new business practices as needed.
7. Corona will provide timely responses to critical issues raised by the Advanced's Project Manager.
8. If this SOW requires on-site presence, Corona will make available meeting spaces as required for project meetings. Meeting spaces should be equipped with a white board and markers, flip chart, LCD projector, conference phone and internet connection.
9. If this SOW requires on-site presence, Corona shall establish a training/testing room that will provide space, computers (with necessary software) and access to the software for the number of users specified in the contract. The training room will be equipped with a white board and markers, flip chart, LCD projector, conference phone and internet connections.
10. Corona will ensure mutually agreed upon Change Orders are approved and process in accordance with the Change Order Procedure.
11. Corona Staff will attend scheduled training sessions.
12. Corona will perform testing as required including functional testing, integration testing, and user acceptance testing and will provide the documented test cases and results to Advanced utilizing the Advanced Testing Tool (Smartsheet).
13. Corona will perform manual cut over tasks identified in the data conversion and the cutover plan.
14. With support from Advanced, Corona will be responsible to create, configure and test all Corona Owned Control Forms (including but not limited to service orders, actions, letters, security, admin). Advanced will provide training Corona on the same.
15. Corona will provide network connectivity to the Infinity Cloud Platform.

Constraints and Assumptions

1. All prices are quoted in US dollars.
2. The Fixed Cost will be firm for the services identified herein through the project's duration of 10 to 12 months and 1 month of post-implementation support. Advanced has agreed to complete the implementation within 13 months. If circumstances occur that result in delays to the project, any extensions will be reviewed and managed via the Change Control Process.
3. Corona will upgrade CIS Infinity Version 3 to the recommended v3 release prior to Advanced conducting any data integrity or data cleanup activities.
4. Corona recognizes that this is a project and not normal daily operations. All team members may not be accustomed to the demands of a project and will have to readily adjust to the needs of meeting deadlines and multi-tasking for this project to be successful.
5. Staffing issues will be resolved between Corona and the Advanced Project Managers. Both parties will make every reasonable effort to maintain stable project staffing for the life of the project and minimize disruption to the project.
6. Corona will strive to make a reasonable effort to minimize the impact of competing initiatives within the organization that may have a negative impact to the project. If this cannot occur:
 - i) Corona will define an escalation path which defines who can resolve resource allocation conflicts, determine the priority of the conflicting work, and communicate with the affected parties, including the Project Managers of both projects.
 - ii) Advanced will make commercially reasonable efforts to work around any conflicting priorities. Depending on the length of time the resource is not available and task the conflict occurs on, this could result in a delay in the project schedule. If these delays result in extended project timelines, a Change Order will be issued to outline the impacts to schedule and cost.
 - iii) Impacts and/or changes to project resources by either party are the responsibility of that same party to replace and provide knowledge transfer that will mitigate the risk of the resource loss.
7. Prompt decision-making and problem resolution will be required to achieve an on-time, on-budget project completion. It is expected most decisions and/or problems will be resolved within five (5) business days (or to a mutually agreed to timeframe). Reasonable efforts will be made to meet the requirements.
8. Corona will empower Corona's project team members to make decisions related to configuration and business processes. For some key decisions Corona team may be required to elevate the decision process to the executive team. Corona will work to minimize the escalation of decisions to keep the decision process as streamlined and timely as possible.
9. Corona and Advanced will ensure their respective Project Team members are available for meetings, workshops, discussions and conference calls upon request by either organization with reasonable notice. All Project Team members will respond to information requests by either organization within (5) Business Days unless otherwise agreed to, to minimize delays in the project.
10. Both parties agree to work a reasonable number of additional hours (when required) to help complete project deliverables and project timelines as agreed upon by both Project Managers.

11. All Corona and Advanced Project Team members are expected to take normal vacation and holiday days throughout the course of the project except during stages of the project where their presence is critical.
12. Corona is willing to consider and implement, when mutually acceptable, Advanced' "Best Practices" to minimize the need for software modifications to the extent these practices meet the CIS Solution Requirements.
13. Advanced's implementation team will recommend configurations and processes based on its industry experience and knowledge of the Advanced solution. Corona is willing to consider and implement, when mutually acceptable, Advanced' "Best Practices" to minimize the need for software modifications to the extent these practices meet the CIS Solution Requirements. This may not always be possible, but Corona will approach each opportunity from this perspective.

In the event that Corona rejects any of Advanced's Best Practices recommendations, Corona will be required to sign an acknowledgement of such decision. This document will describe Advanced's concerns about Corona's requested functionality, and Corona's acceptance that a subsequent reversal or modification of such functionality shall be considered an increase in project scope at the agreed upon hourly rate. Furthermore, this document shall describe any impact to Advanced's ability to provide ongoing support, including any impacts to the annual software subscription fee.

14. When onsite Advanced agrees to work within Corona standard business hours whenever possible with the understanding that travel days may impact onsite days. Additionally, it is important to note that there may be times in the project where key staff may be required to work extra hours or hours outside of the standard business hours. For example, cutover is typically done over the weekend.

Task 1 – Project Management

Project management occurs throughout the project. Advanced will have primary responsibility for the successful completion of this project as defined in the Scope of Work, including the management of all Advanced resources and tasks. Advanced will be responsible for conducting project related administrative activities including the development and updates, as required, to the project schedule. The Advanced Project Manager (PM) will provide oversight and guidance to Advanced staff to ensure successful completion of Advanced led/assigned activities and related project tasks. Similarly, the Corona PM will provide oversight and guidance to Corona staff to ensure successful completion of Corona led/assigned activities and related project tasks.

Subtask 1.1 – Project Planning

Advanced and Corona will partner together for successful project execution. Project Initiation will involve all members of the Advanced and Corona project team. Prior to the remote Project Kickoff meeting, Advanced and Corona will assemble their respective teams who will review this SOW in preparation of the Project Kickoff meeting. It is also highly recommended that the Corona review the Infinity CIS upgrade documentation prior to the Project Kickoff meeting.

The Project Schedule for Corona identifies the activities, deliverables and resources required for the successful upgrade of Infinity CIS. The Advanced PM and the Corona PM will review the Project Schedule and internal project dates that may affect project milestones (for example, third party delivery dates). Corona is responsible for managing the timelines and deliverables of any third-party vendor, to ensure they meet the requirements of the approved Project Schedule. The Advanced PM and the Corona PM will finalize the project schedule within 2 weeks of the Project Kickoff meeting.

Any significant changes to the project timeline during the project are to be communicated and reviewed by the Project Sponsors of Corona and at Advanced. Significant changes affecting the overall scope of the project may necessitate the use of a Scope of Work Amendment process. (See Change Control).

Change Control Process

Advanced will coordinate a joint effort with Corona to document a Change Control process to manage project scope. The Change Control process will identify how changes are initiated and their impact on the project will be identified, documented and communicated to Corona. Appropriate sign-off channels will be developed for Change Order approval.

Subtask 1.2 – Status Reports

Status reporting provides a mechanism for monitoring and controlling the project progress. Advanced will use various methods to communicate regularly with Corona including status reports and status meetings. Additional project communications will be performed via E-mail and telephone on an as needed basis.

Advanced's Project Manager will attend status meetings with Corona Project Manager either in person or via telephone conference call to focus on project status/progress, issues which could impact project schedule, technical or operational issues affecting the project and risk assessment. These meetings shall occur on a weekly basis.

Advanced will provide a weekly status report documenting work in progress compared to schedule, issues, actions, risks and budget. Advanced will also provide a monthly summary of project progress, including significant risks and issues resolved and significant risks and issues raised.

Subtask 1.2 – Deliverables

Subtask 1.2 Deliverables	<ul style="list-style-type: none">• Weekly Status Meeting and Report• Monthly Project Progress Summary
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Subtask 1.3 – Quarterly Sponsor Review

Advanced will prepare a Quarterly Sponsor Review to be attended by project management and project sponsor staff from both Corona and Advanced. The quarterly sponsor review meeting will review progress to date, future actions, and will validate, on a quarterly basis, that the Go Live date is still achievable for both parties. The dates for these meeting will be determined jointly by the Corona and the Advanced PM.

Subtask 1.3 – Deliverables

Subtask 1.3 Deliverables	<ul style="list-style-type: none">• Quarterly Sponsor Review
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Task 2 – Infinity CIS Interfaces

This task covers the Infinity CIS interfaces to existing Corona systems, and/or related products in the Infinity product suite. Development effort may be required by the vendor for the system to which Advanced is interfacing. These vendor costs, if any, are the responsibility of Corona and are not in scope.

Advanced will document the status of development, whether conducted by Corona or Advanced, in the weekly status reports.

Subtask 2.1 – Interfaces

The following group of interfaces will require efforts from Advanced, and potentially Corona staff or a third-party vendor, to support the specific interface requirements. Advanced will develop the following group of interfaces required by Corona under this SOW. The specific system Modifications required to support a specific interface will be determined during the Interface Discovery workshop. For Interfaces introduced that are not currently in CIS V3, Advanced will create Business Requirements Document (BRD) and Use Case Document for each interface requiring development effort from Advanced's technical staff (not applicable to existing Corona interfaces).

Subtask 2.1.1 – Neptune Meter Reading Import/Export

A two-way batch file interface between CIS Infinity and Neptune 360 meter reading software will be implemented to support the export of account and meter related information from CIS Infinity to the meter reading software, as well as the import of the meter data reads, meter notes, comments and trouble codes for billing purposes from the meter reading system to CIS Infinity

Action	Responsible Party
Provide meter read request file layout	Corona
Configure meter read request file layout in CIS Infinity	AUS
Configure meter read request interface in CIS Infinity	AUS
Provide instruction on how to run the meter read request process in CIS Infinity	AUS
Run meter read request process in CIS Infinity to create the meter read request file	Corona
Send meter read request file to meter reading system	Corona
Provide meter read import file layout	Corona
Configure meter read import file layout in CIS Infinity	AUS
Configure meter read import interface in CIS Infinity	AUS
Provide instruction on how to run the meter read import in CIS Infinity	AUS
Download the meter reading import from the meter reading system, and place it at a location accessible to CIS Infinity	Corona
Run meter reading import process in CIS Infinity	Corona

Subtask 2.1.2 – Itron Meter Reading Import/Export

A two-way batch file interface between CIS Infinity and Itron meter reading software will be implemented to support the export of account and meter related information from CIS Infinity to the meter reading software, as well as the import of the meter data reads, meter notes, comments and trouble codes for billing purposes from the meter reading system to CIS Infinity

Action	Responsible Party
Provide meter read request file layout	Corona
Configure meter read request file layout in CIS Infinity	AUS
Configure meter read request interface in CIS Infinity	AUS
Provide instruction on how to run the meter read request process in CIS Infinity	AUS
Run meter read request process in CIS Infinity to create the meter read request file	Corona
Send meter read request file to meter reading system	Corona
Provide meter read import file layout	Corona
Configure meter read import file layout in CIS Infinity	AUS
Configure meter read import interface in CIS Infinity	AUS
Provide instruction on how to run the meter read import in CIS Infinity	AUS
Download the meter reading import from the meter reading system, and place it at a location accessible to CIS Infinity	Corona
Run meter reading import process in CIS Infinity	Corona

Subtask 2.1.3 – Alexander Meter Reading Import/Export

A two-way batch file interface between CIS Infinity and Alexander meter reading software will be implemented to support the export of account and meter related information from CIS Infinity to the meter reading software, as well as the import of the meter data reads, meter notes, comments and trouble codes for billing purposes from the meter reading system to CIS Infinity

Action	Responsible Party
Provide meter read request file layout	Corona
Configure meter read request file layout in CIS Infinity	AUS
Configure meter read request interface in CIS Infinity	AUS
Provide instruction on how to run the meter read request process in CIS Infinity	AUS
Run meter read request process in CIS Infinity to create the meter read request file	Corona
Send meter read request file to meter reading system	Corona
Provide meter read import file layout	Corona
Configure meter read import file layout in CIS Infinity	AUS
Configure meter read import interface in CIS Infinity	AUS
Provide instruction on how to run the meter read import in CIS Infinity	AUS
Download the meter reading import from the meter reading system, and place it at a location accessible to CIS Infinity	Corona
Run meter reading import process in CIS Infinity	Corona

Subtask 2.1.3 – Waterscope Meter Reading Import/Export

A two-way batch file interface between CIS Infinity and Waterscope meter reading software will be implemented to support the export of account and meter related information from CIS Infinity to the meter reading software, as well as the import of the meter data reads, meter notes, comments and trouble codes for billing purposes from the meter reading system to CIS Infinity

Action	Responsible Party
Provide meter read request file layout	Corona
Configure meter read request file layout in CIS Infinity	AUS
Configure meter read request interface in CIS Infinity	AUS
Provide instruction on how to run the meter read request process in CIS Infinity	AUS
Run meter read request process in CIS Infinity to create the meter read request file	Corona

Send meter read request file to meter reading system	Corona
Provide meter read import file layout	Corona
Configure meter read import file layout in CIS Infinity	AUS
Configure meter read import interface in CIS Infinity	AUS
Provide instruction on how to run the meter read import in CIS Infinity	AUS
Download the meter reading import from the meter reading system, and place it at a location accessible to CIS Infinity	Corona
Run meter reading import process in CIS Infinity	Corona

Subtask 2.1.4 – Vanco Payments Interface

A one-way batch interface will be implemented to import in CIS Infinity utility customer payments coming from Vanco.

Action	Responsible Party
Provide Vanco payment import file layout.	Corona
Configure Vanco payment import file layout in CIS Infinity	AUS
Configure Vanco payment import interface in CIS Infinity	AUS
Provide instruction on how to run the Vanco payment import process in CIS Infinity	AUS
Download the Vanco payment import file at a location accessible to CIS Infinity	Corona
Run the Vanco payment import process in CIS Infinity	Corona

Subtask 2.1.5 – Remit Plus Payments Interface

A one-way batch interface will be implemented to import in CIS Infinity utility customer payments coming from Remit Plus.

Action	Responsible Party
Provide Remit Plus payment import file layout.	Corona
Configure Remit Plus payment import file layout in CIS Infinity	AUS
Configure Remit Plus payment import interface in CIS Infinity	AUS
Provide instruction on how to run the Vanco payment import process in CIS Infinity	AUS
Download the Remit Plus payment import file at a location accessible to CIS Infinity	Corona
Run the Remit Plus payment import process in CIS Infinity	Corona

Subtask 2.1.6 – RTL Payments Interface

A one-way batch interface will be implemented to import in CIS Infinity utility customer payments coming from RTL.

Action	Responsible Party
Provide RTL payment import file layout.	Corona
Configure RTL payment import file layout in CIS Infinity	AUS
Configure RTL payment import interface in CIS Infinity	AUS
Provide instruction on how to run the RTL payment import process in CIS Infinity	AUS
Download the RTL payment import file at a location accessible to CIS Infinity	Corona
Run the RTL payment import process in CIS Infinity	Corona

Subtask 2.1.7 – Paymentus Customer Information File Interface

A one-way batch interface will be implemented to export customer information from CIS Infinity to Paymentus.

The interface will support the export of customer and account details, including account balances, using an export file with the layout configurable in CIS Infinity.

Action	Responsible Party
Provide Customer Information File (CIF) layout.	Corona
Configure CIF layout in CIS Infinity	AUS
Configure CIF export interface in CIS Infinity	AUS
Provide instruction on how to run the CIF export process in CIS Infinity	AUS
Run the CIF export process in CIS Infinity to generate the CIF file	Corona
Provide the CIF file to Paymentus	Corona

Subtask 2.1.8 – Promise Pay Arrangement Import Interface

Two one-way batch interfaces will be implemented to import customer payment arrangements information in CIS Infinity from Promise Pay.

The interfaces will support

1. Addition of new customer payment arrangements in CIS Infinity
2. Update of existing customer arrangement dates and /or amounts in CIS Infinity.

The layouts of the Promise Pay import files will be configured in CIS Infinity.

Action	Responsible Party
Provide new payment arrangement import file layout.	Corona
Configure new payment arrangement layout in CIS Infinity	AUS
Configure new payment arrangement import interface in CIS Infinity	AUS
Provide instruction on how to run the new payment arrangement import process in CIS Infinity	AUS
Run the new payment arrangement import process in CIS Infinity	Corona
Provide payment arrangement update import file layout.	Corona
Configure payment arrangement update layout in CIS Infinity	AUS
Configure payment arrangement update import interface in CIS Infinity	AUS
Provide instruction on how to run the payment arrangement update import process in CIS Infinity	AUS

Subtask 2.1.9 – Accelerated Innovations or SilverBlaze

Advanced has standard integrations with both Accelerated Innovations, MyMeter solution as well as SilverBlaze Customer Portal. Regardless of which solution Corona decides to deploy, as a part of this project, Advanced will deploy an integration to one of those systems.

Exclusions

The following have been excluded from this Scope of Work, unless noted otherwise:

1. Rate Structural Changes

Advanced will provide normal rate updates throughout the course of the implementation at no extra charge providing the rate change occurs during the implementation timeframe. A rate change that departs substantially from the current rate structures that are in force at the time of contract signing and/or as documented in the Functional Discovery document will follow the jointly developed Change Order Process as defined in Subtask 1.1.

2. Third Party Payment Processor

Real Time credit/debit card payment processing is provided via an interface to an Advanced partner payment processing vendor namely; Paymentus or Paymentus. Any payment transaction fees charged by the payment processing vendor are the responsibility of Corona. Corona must have a contract with the payment processor to which the solution will be integrated prior to the start date of Functional Testing as defined in the project schedule.

3. Promise Pay Interface Exports

Export out of CIS into Promise Pay will require data mapping and business requirements documentation. Scope and Level of Effort will be unknown until the business requirements documentation is complete, this will be conducted as a part of the change order process.

Task 3 - Implementation Approach

This task covers the implementation approach Advanced will take to upgrade and reimplement Corona's CIS Solution. Advanced will implement a phased approach as described herein.

Subtask 3.1 – Phase 1 – Project Initiation

The Advanced PM will work with the Corona Project Manager and staff to organize project information for the preparation of the Project Schedule (see Task1). The Advanced PM will organize and present all the information required to start the project and will, at a minimum, address the following areas:

- Project Schedule
- Software Provisioning in the Advanced Infinity Cloud Platform
- Training Course Syllabus for Core Team, Technical Team, and End User Training (part of the Training Plan)
- Issues Tracking Tool set-up and overview
- Access to CIS Infinity Entity Relationship Diagram and Data Dictionary
- Project Team Contact List which includes users that need access to the Issues Tracking Tool
- Overview of the operations of Infinity CIS via online conference
- Functional Discovery agendas delivery and review

The Advanced PM will oversee the daily activities of the project and work in conjunction with the Corona's Project Manager and staff to ensure effective management of staff resourcing, forward planning initiatives and day to day project deliveries.

Subtask 3.1 – Deliverables

Subtask 3.1 Deliverables	<ul style="list-style-type: none"> • Project Kickoff Meeting • Initial Project Schedule • Training Course Agenda • Issues Tracking Tool Overview • Project Team Contact List
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Subtask 3.1 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Contracts signed	Advanced and Corona
✓ Transition discussion from Sales to Professional Services	Advanced and Corona
✓ Project Team identified	Advanced and Corona

Subtask 3.1 – Exit Criteria

Criteria	Responsible Party
✓ Environments provisioned and signed off	Advanced and Corona
✓ 3.1 Deliverables completed	Advanced
✓ Hosted environment(s) setup and CIS application provisioned and accessible by client	Advanced
✓ Connect Cloud environment to on-premise solutions (I.e. legacy systems, printers, email services, etc.)	Corona

Subtask 3.2 – Phase 2 – Functional Discovery Analysis

Advanced will review the detailed data and business requirements of Corona. This analysis will provide an association between Corona’s business practices and the required Infinity CIS configuration.

The Functional Discovery Analysis phase will be led by Advanced and broken out into functional workshops. The workshops review the functional areas of the system and are the basis for how Advanced will configure, and convert the required business functions, business logic and data in the system.

Subtask 3.2.1 – Functional Discovery Analysis Workshops

Advanced will conduct Functional Discovery Analysis Workshops. These workshops will be led by Advanced to appropriately review and confirm all required information for the areas listed below. Advanced and Corona will identify the necessary Corona staff needed to attend these workshops two to four weeks in advance. Reports and Bill Print discoveries as outlined in Subtask 3.4 will be separate from the main functional discovery workshops and will be conducted at a time indicated in the Project Schedule.

Advanced will deliver a Functional Discovery Document that will address the items from the functional requirements and include, at a minimum, the following areas:

1. Foundation

Review of the basic system set up areas and logical business rules including but not limited to account types, services and customer/account information.

2. Billing

Review of the entire meter reading to billing process with a review of all processing and exceptions reporting.

3. Rates

Review of the rate tariff and functional requirements for setting up rates, including but not limited to formulas, proration and multipliers .

4. Cashiering

Review of all payment types, interfaces, automated clearing house, endorsements, receipts and unapplied payments processing.

5. Collections

Review of all collections procedures, payment arrangements, exemptions, penalties, notices, disconnections, agency, add to tax/liens, tax certification, bankruptcy and write-off processes including all applicable fees.

Collection process is not currently setup / limited setup exists in the Infinity CIS V3. Advanced will gather the business requirements and configure the collections process in Infinity CIS as part of the upgrade. Corona and Advanced will work on this request together and determine the feasibility in going live with this new feature or to roll it out after Infintiy CIS upgrade is complete. This new change should not impact the upgrade of existing CIS.

Subtask 3.2.1 – Deliverables

Subtask 3.2.1 Deliverables	<ul style="list-style-type: none"> • Functional Discovery Workshop • Functional Discovery Document
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Subtask 3.2.1 – Entry Criteria

Criteria	Responsible Party
✓ Functional Discovery Agendas delivered	Advanced
✓ Chart of Accounts, Rates, Configurable Interfaces Files Layouts, All As Is Process Flows gathered	Corona

Subtask 3.2.1 – Exit Criteria

Criteria	Responsible Party
✓ Corona Core Team and/or SME’s attendance at Functional Workshop	Corona
✓ Functional Discovery Workshops conducted	Advanced
✓ Functional Discovery Document delivered	Advanced
✓ Review and edits/Sign Off of Functional Discovery Document 10 days from receipt of each iterative version	Corona

Subtask 3.3 – Phase 3 – Interface Discovery

Advanced will conduct an Interface Discovery Analysis Workshop. Advanced will provide a Discovery Agenda and working with Corona will identify necessary Corona staff needed to attend this workshop two weeks in advance. Advanced will review with Corona all interfaces identified in Task 2, to be developed in Infinity CIS.

Advanced will summarize the Interface Discovery discussions in an Interface Discovery Summary document that will be provided to Corona to review and update as required.

Below are the minimum topics that will be covered:

- Functional (business) requirements analysis
- Use Case analysis

Advanced will create a detailed Business Requirements Document (BRD) and a Use Case Document for each development interface and modification requiring development (items in subtasks 2.1) for review and acceptance by Corona. Configuration only type interfaces identified will not require a BRD.

Advanced will review the documentation with Corona remotely and update as required.

Subtask 3.3 – Deliverables

Subtask 3.3 Deliverables	<ul style="list-style-type: none"> • Interface Discovery Agenda • Interface Discovery Workshop • Interface Discovery Summary • Use Case Document(s)
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Subtask 3.3 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Interface Discovery Agenda delivered	Advanced
✓ 3 rd Party Vendor participation secured (if applicable)	Corona
✓ Staff SME participation secured	Corona

Subtask 3.3 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Interface Discovery Workshop complete	Advanced
✓ SME attendance and 3 rd Party Vendor (if applicable) attendance at Interface Discovery Workshop	Corona
✓ Interface Discovery Summary Document delivered	Advanced
✓ Use Case Document(s) delivered	Advanced
✓ Review and edits/Sign Off of Interface Discovery Summary 10 days from receipt of each iterative version	Corona

Subtask 3.4 – Phase 4 – Other Discoveries

Subtask 3.4.1 – Reports Discovery

Advanced will convert the existing standard reports that are part of the Infinity CIS V3 to Infinity CIS v5. Any custom report built outside of the CIS system and/or custom built in the CIS system will be considered out of scope and will follow the Change Order process as identified in Subtask 1.1. Corona will need to provide the logic to complete these reports.

Advanced will conduct a Reports Discovery Workshop for any custom reports requirements. This workshop will be led by Advanced.

Subtask 3.4.1 – Deliverables

Subtask 3.4.1 Deliverables	<ul style="list-style-type: none"> • Reports Discovery • Reports Analysis Spreadsheet
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Subtask 3.4.1 – Entry Criteria

Criteria	Responsible Party
✓ Reports Analysis Spreadsheet delivered	Advanced
✓ Reports Analysis Spreadsheet populated with all Corona’s reports one month prior to scheduled Reports Discovery Workshop	Corona
✓ Analysis of Reports Discovery Spreadsheet complete and available for Reports Discovery Workshop	Advanced

Subtask 3.4.1 – Exit Criteria

Criteria	Responsible Party
✓ Reports Discovery Workshop conducted	Advanced
✓ SME attendance at Reports Discovery Workshop	Corona
✓ Determination of custom reports delivered in CIS	Advanced

Subtask 3.4.2 – Bill Print and/or Notices & Receipt Discovery

Advanced will convert the existing standard Bill Prints and/or Notices that are part of the Infinity CIS V3 to Infinity CIS v5. Any custom bill prints/notices built outside of the CIS system and/or custom built in the CIS system will be considered out of scope and will follow the Change Order process as identified in Subtask 1.1. Corona will need to provide the logic to complete these changes.

Advanced will conduct a Bill Print/Notice Discovery Workshop for any custom bill print/notice requirements. This workshop will be led by Advanced.

Subtask 3.4.2 – Deliverables

Subtask 3.4.2 Deliverables	<ul style="list-style-type: none"> • Bill Print Discovery Workshop • Bill Print Specifications
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Subtask 3.4.2 – Entry Criteria

Criteria	Responsible Party
✓ Bill Print Samples provided	Advanced
✓ Agenda for Bill Print/Notices & Receipt Discovery delivered	Advanced

✓ Bill print vendor capabilities/restrictions	Corona
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Subtask 3.4.2 – Exit Criteria

Criteria	Responsible Party
✓ Bill Print/Notices & Receipt Discovery Workshop conducted	Advanced
✓ SME attendance at Discovery Workshop	Corona
✓ Bill Print Specifications Document delivered	Advanced
✓ Review and edits/Sign Off of Use Case Document(s) 10 days from receipt of each iterative version	Corona

Subtask 3.5 – Phase 5 – Data Integrity Check/Clean Up & Initial Data Conversion/Configuration

Subtask 3.5.1 - Version 3 Data Integrity Check and Clean up

Prior to the Infinity CIS upgrade conversion, the V3 Integrity Check Utility will be run by Advanced in coordination with Corona within the Version 3 Upgrade Environment. The Version 3 Upgrade Environment must be refreshed from production by Corona prior to running the V3 Integrity Check Utility. The V3 Integrity Check Utility will report on data integrity issues within the Version 3 database, which, if not resolved, will prevent the successful upgrading of the Version 3 database to the Infinity CIS database. The V3 Data Integrity Check utility will find and report on data integrity issues, such as missing links (orphaned records), code look-ups and unpopulated required fields, Advanced staff will analyze issues reported by the Integrity Check Utility and prepare SQL scripts as required to resolve data issues and to review with the Corona team via a Data Discovery session. Data fixes will be applied by Advanced in the Upgrade Environment. Corona will review data fixes and once approved, Corona will run scripts and make data changes in your V3 Production Environment.

Subtask 3.5.1 – Deliverables

Subtask 3.5.1 Deliverables	<ul style="list-style-type: none"> • Run V3 Integrity Check Utility on CIS Infinity Version 3 Upgrade Environment (Refreshed) • Identify, resolve and update data changes into CIS Infinity Version 3 Upgrade Environment prior to the initial conversion of the V3 database to Infinity CIS • Initial Configuration Rollout • Develop and run V3 data clean up scripts in the Version 3 Upgrade Environment prior to the initial conversion of the V3 database to Infinity CIS • Refresh Version 3 Upgrade Environment from Version 3 Production Environment
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Subtask 3.5.1 – Entry Criteria

Criteria	Responsible Party
✓ New data cut that includes 100% of the agreed upon data from CIS V3 and provided no later than 2 weeks prior to Initial Rollout	Corona
✓ Data Validation Parameters Finalized	Advanced and Corona
✓ Functional Discovery Document signed off per timelines outlined in project schedule and no later than 2 months prior to scheduled rollout	Corona
✓ Baseline Accounts established, documented and provided to Advanced	Corona

Subtask 3.5 – Exit Criteria

Criteria	Responsible Party
✓ Initial Configuration complete to include no less than 70% of the total configuration requirements outlined in the Functional Discovery Document, excluding all configurable interfaces	Advanced
✓ Data Validation reviewed jointly and anomalies under investigation by both parties	Advanced and Corona
✓ All generic testing documents delivered including: conversion, End to End Testing, Bill Print Scenarios	Advanced
✓ Review of Issues Tracking Tool	Advanced
✓ Commencement of conversion testing against Baseline Accounts	Corona

Subtask 3.5.2 - Infinity CIS Initial Upgrade Conversion, Data Validation and Testing

Once the Version 4 data integrity and cleanup process is complete Advanced will convert Corona’s V3 data and load into Corona’s Infinity CIS Environment.

Advanced will supply a data validation report confirming both Version 3 and Infinity CIS systems are in balance and will release the system for testing by Corona.

The initial Infinity CIS Upgrade Conversion will average one to two days. The length of time necessary for conversion is dependent on several key factors including the size of the current database and number of years of data being converted.

NOTE:

The upgrade conversion routine does not automate the upgrade of interfaces, Corona security settings, hyperlinks, saved reporting criteria, information bars, billing formulas, bill prints, notices & receipts and custom reports. Advanced and Corona will need to configure these manually as identified below.

Advanced is responsible for converting/configuring

- All billing formulas required by Corona in Infinity CIS

- Current bill prints, notices and receipts
- Generic Information Bars
- Interfaces (Delivered at Integration Testing)

Corona is responsible for converting/configuring:

- User security
- Hyperlinks

- Configuration of security is required for the Integration Testing phase.

Prior to the completion of the Initial Upgrade Conversion Corona will select a group of Baseline Accounts. Baseline Accounts provide Corona’s staff with a point of reference when completing testing. The Baseline Accounts represent a cross-section of account types and include accounts handled differently than “normal” accounts. For example, a sample of an account for each rate code, an account with automatic withdrawal, accounts with multiple meters, and account with compound meters are all examples of accounts that should be included in Corona’s Baseline Accounts, as applicable. As part of the Initial Upgrade Conversion, Corona will undertake testing of the Infinity CIS Upgrade conversion. Corona’s project manager will coordinate the completion of the Infinity CIS Upgrade conversion testing and submit any issues identified in Team Support. This testing will provide Advanced with information relating to upgrade conversion anomalies to be corrected. Re-testing of identified conversion issues will be necessary.

During Initial Upgrade Conversion testing (and subsequent test phases), Advanced will access Corona’s server in order to upload data corrections, with the assistance of Corona’s technical staff. The users will re-test anomalies based on initial test results and established Baseline Accounts.

Subtask 3.5.2 Deliverables	<ul style="list-style-type: none"> • Advanced Convert CIS Infinity Version 3 database to Infinity CIS database • Advanced Deliver Data Validation Report which validates conversion accuracy between V3 and V5 • Advanced Review and deliver initial V5 data conversion load with Corona • Advanced Time the process to convert and load data • Advanced Configure generic Information Bars • Corona Review and approve the Data Validation Report • Corona Run reports currently used by Corona for balancing system in V3 and V5 to confirm versions are in balance • Corona Load refreshed Infinity CIS test database onto Advanced FTP site (required for troubleshooting and billing formula conversion) • Corona Identify Baseline Accounts for testing • Corona Create test scripts and share with Advanced • Corona Run CIS Infinity V5 Data Validation Tool to compare and validate V3 data.
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Subtask 3.6 – Phase 6 – Core Team Training

Advanced will provide 2 weeks of Core Team Training to the Corona Core Team.

Core Team Training will be conducted remotely via WebEx for the core team following the initial V5 conversion rollout. Users will be trained to ensure that they can access the system and navigate through Infinity CIS for testing purposes. To ensure an efficient and effective parallel process, Advanced recommends setting up a separate area for testing and training. The core team training is designed to train users on the new user interface (UI) and changes in key functional areas including AccountView, System Administration, Security, Cash, Billing, Collections, Service Orders, Reports, and Inventory. Core Team training assumes users are familiar with Version 3 and Corona’s business processes and does not include introductory or basic training to users unfamiliar with Version 3 functionality and processes.

Subtask 3.6 – Deliverables

Subtask 3.6 Deliverables	<ul style="list-style-type: none"> • Standard CIS Infinity CIS Training Agendas • Completion of Instructor-Led remote Core Team Training
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Subtask 3.6 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Agenda delivered	Advanced
✓ Where applicable, Training Room/workstations/software/participants available for training	Corona
✓ Infinity CIS System QA'd and prepared for Training	Advanced

Subtask 3.6 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Instructor-Led remote Core Team Training delivered	Advanced
✓ 90% Attendance rate from Core Team at all sessions	Corona

Subtask 3.7 – Phase 7 – Reports Development and Delivery

Reports in Infinity CIS V3 identified during Reports Discovery will be converted to Infinity CIS system for review and acceptance by Corona.

Any custom reports identified at Reports Discovery will be developed and delivered by Advanced once Corona has signed off on the specifications. Any custom reports unidentified at the Reports Discovery will be recognized as out of scope and follow the Change Order Process.

Subtask 3.7 – Deliverables

Subtask 3.7 Deliverables	<ul style="list-style-type: none"> • Custom Reports Specification, Development & Delivery (if applicable)
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Subtask 3.7 – Entry Criteria

Criteria	Responsible Party
✓ Attendance by SME at Reports Discovery Workshop	Corona
✓ Reports Discovery Workshop complete	Advanced

Subtask 3.7 – Exit Criteria

Criteria	Responsible Party
✓ Custom Reports Specification Document(s) delivered for all identified custom reports	Advanced
✓ Review and edits/Sign Off Custom Reports Specification Document(s) 10 days from receipt of each iterative version	Corona
✓ Custom Report(s) Delivery at start of ITC1	Advanced
✓ Custom Reports(s) Testing and Signoff no later than the end of UAT	Corona

Subtask 3.8 – Phase 8 – Interface Delivery

Once an interface has been implemented, unit tested and QA'd internally by Advanced, Corona will be notified that the interface is ready to be released and available for testing or Corona will be notified that the interface is ready to be released and deployed in Corona's environment through an executable or build.

Subtask 3.8.1 – Deliverables

Subtask 3.8.1 Deliverables	<ul style="list-style-type: none"> • Interfaces are ready for Corona to test
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Subtask 3.8.1 – Entry Criteria

Criteria	Responsible Party
✓ File Layout for each interface provided during Interfaces Discovery	Corona
✓ 3 rd Party Vendor participation in Interface Discovery process (if applicable)	Corona

Subtask 3.8.1 – Exit Criteria

Criteria	Responsible Party
✓ Interfaces delivered	Advanced
✓ Testing of interfaces with 3 rd party vendor participation (if applicable)	Corona

Subtask 3.9 – Phase 9 – Software Testing

Advanced will support all software testing through possible combinations of onsite support, remote support and video conferencing online support. Validated testing criteria will be used to determine if the testing phase is complete and the system is ready for the next cycle of testing. The Advanced PM will provide Corona with generic test scripts. Modification of test scripts to match Corona’s specific business scenarios is the responsibility of Corona. From the test scripts Corona will create an ITC Plan (Integration Testing Cycle), and User Acceptance Test (UAT) Plan.

At the start of each test cycle, a full data conversion using a fresh data extract will be performed to exercise the data conversion process and to update any required data fixes that are found through testing. Data Conversion is an iterative process and will require fixes throughout all testing phases based on the outcomes of each testing phase.

With each data conversion Advanced will provide and Corona will verify all balancing metrics that were agreed upon in the Data Conversion Discovery. Deficiencies found during the Software Testing Phase will be entered into the Issues Tracking Tool for the correction of configuration, data conversion and/or system deficiencies. Deficiencies will be entered into the Issues Tracking Tool by Corona. The Issues Tracking Tool maintains a history of analysis and problem resolution.

The Issues Tracking Tool will be managed and maintained by the Advanced PM and will be reviewed with both Advanced and Corona staff to ensure the issues are being actively worked and tested. The Advanced PM will be proactive in the resolution of items logged in the Issues Tracking Tool so that they will be resolved within a timely manner. The Advanced PM or designate will document to the Corona Project Manager (in detail) the issue or defect, the resolution or workaround alternative, if applicable.

Advanced will provide a technical point of contact during all testing phases, Advanced will provide responses that include justification and mitigation plans, where applicable.

Corona will provide Advanced with evidence through Test Cases utilizing the Advanced Testing Tool (Smartsheet) and various other methods of testing documentation that testing is being done and progressing through the test phases.

The software testing phase is divided into the following test cycles:

Subtask 3.9.1 – Functional Testing

Functional testing will utilize the baseline accounts to confirm that the data conversion and basic functions in the system are working as expected. Individual accounts will be reviewed and will run through a meter to cash process. In the review of these individual accounts, Corona will be tasked with testing each rate element in the system and documenting the results to confirm that the billing process works prior to starting a cycle billing process. This rate testing will be done against a series of baseline accounts and will look at each rate scenario and all of the associated proration activities that can affect a rate calculation.

Functional Testing is modular and does not test the system end-to-end utilizing interfaces.

Subtask 3.9.1 – Functional Testing Deliverables

Subtask 3.9.1 Deliverables	<ul style="list-style-type: none"> • Functional Test Data Conversion Refresh and Validation Report • Rates Testing Matrix
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Subtask 3.9.1 – Entry Criteria

Criteria	Responsible Party
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✓ Configuration complete in accordance to the requirements outlined in the Functional Discovery Document and excluding all interfaces and modifications	Advanced
✓ Data Refresh timelines recorded for the data cut, conversion and load	Advanced and Corona
✓ Customized Testing Documents designed and functional test cases created in Advanced Testing Tool	Corona
✓ Executed Contract with Payment Processor	Corona

Subtask 3.9.1 – Exit Criteria

Criteria	Responsible Party
✓ Testing of all applicable functional modules using customized test documents and test cases, reporting any anomalies in Issues Tracking Tool	Corona
✓ Retesting of fixed conversion items, testing of conversion additions and report anomalies in Issues Tracking Tool	Corona
✓ Functional Data Validation jointly reviewed and anomalies under investigation by both parties	Advanced and Corona
✓ Rates Testing Completion and anomalies reported in Issues Tracking Tool	Corona
✓ Successful resolution of 70% of critical configuration type tickets reported no less than 15 days from scheduled ITC1 Refresh start date	Advanced
✓ Backup and Restore Site Failover Testing	Advanced
✓ Connectivity validated between CIS platform test instance and dependant systems	Advanced

Subtask 3.9.2 - Integration Testing Cycle (ITC)

ITC will utilize test scripts/cases customized by Corona to confirm that the data conversion and business processes are functioning as expected.

ITC1 is intended to exercise full scale testing of the system incorporating the testing of interfaces and modifications scheduled for ITC1. It includes testing of all end to end processes and all Corona Owned Control Forms (service orders, actions, letter generation, security, admin).

Subtask 3.9.2 – Integration Testing Deliverables

Subtask 3.9.2 Deliverables	<ul style="list-style-type: none"> • ITC1 Data Conversion Refresh and Validation Report • ITC1 Build Release for Modifications
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Subtask 3.9.2 – Entry Criteria ITC1

Criteria	Responsible Party
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✓ Completion of testing of all applicable functional modules using customized test documents and test cases and anomalies reported in Issues Tracking Tool	Corona
✓ Customized Testing Documents designed and ITC1 test cases created in Advanced Testing Tool	Corona
✓ Successful retesting of fixed conversion items and testing of remaining conversion additions. Anomalies reported in Issues Tracking Tool	Corona
✓ ITC Data Validation reviewed jointly and anomalies under investigation by both parties	Advanced and Corona
✓ Rates Testing Completed and any anomalies reported in Issues Tracking Tool	Corona
✓ Successful resolution of 70% of critical path configuration type tickets reported no less than 10 days from ITC1 Refresh start date	Advanced
✓ Interfaces complete	Advanced
✓ Corona Owned Control Forms 60% complete which must include Service Order Types	Corona
✓ Infinity CEP configuration/GUI commencement	Advanced
✓ Corona Payment Processor set up complete and ready for integration testing with Infinity CIS	Advanced

Subtask 3.9.2 – Exit Criteria ITC1

Criteria	Responsible Party
✓ Technical and training daily support for initial week of ITC1 Testing	Advanced
✓ Build Release(s) (if applicable) applied for Interfaces	Advanced
✓ Testing of interfaces with 3 rd party vendor participation (if applicable) and anomalies reported in Issues Tracking Tool	Corona
✓ Successful resolution of 80% of critical path configuration type tickets reported no less than 10 days from scheduled UAT Refresh start date	Advanced
✓ Successful resolution of 80% of conversion type tickets reported no less than 10 days from scheduled UAT Refresh start date	Advanced
✓ Bill Print Testing complete and anomalies reported in Issues Tracking Tool	Corona
✓ Reports Testing Complete and anomalies reported in Issues Tracking Tool	Corona
✓ Cycle Billing Testing Complete and anomalies reported in Issues Tracking Tool	Corona
✓ Corona Owned Control Forms 80% complete	Corona

Subtask 3.9.3 - User Acceptance Testing (UAT)

The final phase of testing is UAT and starts with a code freeze. Only critical path items will be altered during this phase as agreed upon by both parties after analyzing the risk of introducing these changes. Once complete, the UAT constitutes acceptance of the system as ready for Go Live. In combination with staff training readiness and organization readiness, the UAT and its acceptance help to drive the Go/No Go criteria that lock down the live date of the software.

Advanced will coordinate with Corona to select the integration test scripts that will be used during UAT.

The Advanced PM will work with Corona to ensure that test results for each testing phase provide evidence that Infinity CIS capabilities have been properly integrated and tested in Corona’s test environment. Advanced will work with Corona to support performance tests.

Subtask 3.9.3 – User Acceptance Testing Deliverables

Subtask 3.9.3 Deliverables	<ul style="list-style-type: none"> • UAT Data Conversion Refresh and Validation Report • UAT Acceptance Criteria
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Subtask 3.9.3 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ UAT Data Validation reviewed jointly and anomalies under investigation by both parties	Advanced and Corona
✓ Retested interfaces and modifications with 3 rd party vendor participation (if applicable) and anomalies reported in Issues Tracking Tool	Corona
✓ Successful resolution of 90% of critical path configuration type tickets reported no less than 10 days from scheduled UAT Refresh start date	Advanced
✓ Successful resolution of 90% of conversion type tickets reported no less than 10 days from scheduled UAT Refresh start date	Advanced
✓ Bill Print Testing completed and signed off	Corona
✓ Reports Testing completed and signed off	Corona
✓ System Code Freeze	Advanced
✓ Final review of Corona Owned Control Forms	Corona

Subtask 3.9.3 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Successful testing of all end to end processes	Corona
✓ Successful resolution of all critical path conversion and configuration type tickets	Advanced
✓ Successful completion of all Corona Owned Control Forms	Corona
✓ Regression and stress test executed successfully	Corona

✓ Successful testing of Payment Processor	Corona
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Subtask 3.10 – Phase 10 – End User Training

Advanced will provide 1 week of Infinity CIS End User training to Corona to secure a working knowledge of Infinity CIS. As part of the Training Plan, Advanced will work with Corona to jointly create the appropriate Training Matrices (part of the Training Plan) that will identify classes and the Advanced and Corona staff attendance needs. End User training assumes users are familiar with Version 3 and Corona’s business processes and does not include introductory or basic training to users unfamiliar with Version 3 functionality and processes.

End User Training will be conducted by a combination of instructor led sessions in accordance with the Training Matrix and with Corona availability to answer participant questions pertaining to Corona business practices.

Each End User training session will have an attendance sheet that matches the End User training schedule. Once each session is complete, Corona will sign-off on a Training Session Sign-off Form signifying that the training session has been completed.

Subtask 3.10 – Deliverables

Subtask 3.10 Deliverables	<ul style="list-style-type: none"> • Completion of Instructor Led End User Training • Training Session Attendance Report • Training Session Signoff form
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Subtask 3.10 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ End User Training Plan Matrix delivered	Advanced
✓ End User Training Plan Matrix completed	Corona
✓ End User Training Schedule created	Advanced and Corona

Subtask 3.10 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ All End User Training sessions required for Go Live complete	Advanced
✓ End Users absent or requiring additional assistance/training from End User Training identified	Advanced
✓ Additional training plan developed and provided to End Users identified as requiring additional assistance/training complete for Go Live	Corona

Subtask 3.11 – Phase 11 – Cut-Over Plan/Go/No Go Criteria

Corona will assist Advanced in the construction of Go/No-Go criteria. These criteria shall be used to determine whether or not to proceed to Phase 12 - Transition to Live. Criteria shall be measured on a weekly basis starting no later than the commencement of User Acceptance Testing. When all criteria are met, Corona shall issue formal authorization to proceed with the Cut-Over Plan to production.

The Advanced PM will develop a Cut-Over Plan throughout the lifecycle of the project in preparation for a final transition to live. This plan details the steps and responsibilities for Advanced and Corona to transition the CIS Solution to Corona production (live) environment. The Cut-Over Plan will include but not be limited to the following items:

- Full emergency contact information
- Detailed steps and communications of when data extract is obtained and data conversion is returned
- Ordered steps for ensuring balancing of the system
- Determination of whether a test system is refreshed at the same time as production for any required process testing
- Post-cut-over checklist
- Criteria that determine when the system will be turned over to end user staff
- A formal release from Advanced that documents that the system has been handed to Corona in full balance

Subtask 3.11 – Cut-Over Plan/Go/No Go Deliverables

Subtask 3.11 Deliverables	<ul style="list-style-type: none"> • Go/No Go Criteria • Cut-Over Plan • Formal Corona Authorization to Transition to Live
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Subtask 3.11 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ System is in a readiness state for all critical path items	Advanced and Corona
✓ Corona has invoked Change Management plan (employees, customers, vendors)	Corona
✓ End Users trained	Advanced or Corona

Subtask 3.11 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Cut-Over Plan finalized	Advanced and Corona
✓ Organizational Readiness Plan finalized	Advanced and Corona
✓ Go/No Go Meeting	Advanced and Corona
✓ Authorization to Go Live	Corona
✓ Post Cut-Over List of Tasks	Advanced and Corona

Subtask 3.12 – Phase 12 – Transition to Live

The cutover to live will occur over a weekend and will be coordinated by the Advanced PM and Corona staff.

The transition to live will have a new and final data conversion in which the data validation parameters, bill codes, rate mapping and transaction codes will all be approved by Corona and the Advanced PM.

Subtask 3.12 – Deliverables

Subtask 3.12 Deliverables	<ul style="list-style-type: none"> • Final Cut-Over Plan Report • Final Release Data Conversion Refresh and Validation Report • AR Balancing Report • Year and month active confirmation • AR Summary Details Report • Transaction Code Report • Rates Report
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Subtask 3.12 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Execution of Cut-Over Plan	Advanced and Corona
✓ End Users trained	Advanced and Corona
✓ 3 rd Party Vendors communicated and on board	Corona
✓ Execution of Organizational Readiness Plan	Advanced and Corona
✓ Connectivity validated between CIS platform production instance and dependant systems	Advanced

Subtask 3.12 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Go Live Signed Off	Corona
✓ Post Live Items identified	Advanced

Subtask 3.13 – Phase 13 – Post Go Live

Advanced will assist Corona throughout the post live implementation phase to identify and respond to any needs and concerns. During the Post Go Live period, Advanced will supply, as per the agreement, remote communications, and online support through video conferencing to ensure a smooth transition to Customer Success. During this phase of the project, the following items will be supplied to Corona:

- Weekly PM and technical staff meetings to review all high-priority items.
- Remote communications and video conference customer support.
- Introduction and transition to Support.

Throughout the Post Go Live period, the Advanced PM will continue to act as primary resource for all issues. Upon completion of the Post live support period, Corona will transition to the Advanced's Customer Success Department as per the Support and Maintenance agreement.

Subtask 3.13 – Deliverables

Subtask 3.13 Deliverables	<ul style="list-style-type: none"> • Monthly Post Live Support Log • Transition to Support
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Subtask 3.13 – Entry Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Go Live Signed Off	Corona
✓ Post Live Punch List Items Identified	Advanced

Subtask 3.13 – Exit Criteria

<u>Criteria</u>	<u>Responsible Party</u>
✓ Post Live Punch List Items resolved	Corona and Advanced
✓ Project Completion documented	Advanced
✓ Transition to Customer Success Group	Advanced

Schedule 1 – Fee Structure and Payment Milestones

Fee Structure

V3 to V5 Upgrade Professional Services Fees	
Line Item	Price
Infinity CIS v5 Installation/Configuration	\$ 50,400.00
Project Management	\$ 109,200.00
Discoveries	\$ 28,350.00
Conversion	\$ 46,200.00
Testing Assistance	\$ 50,400.00
Interfaces	\$ 42,000.00
Training	\$ 16,800.00
Environment Setup	\$ 16,800.00
Post Live Support	\$ 16,800.00
Customer Testing Assistance	\$ 50,000.00
Advanced 25 th Anniversary Discount	(\$ 75,600.00)
Total	\$ 351,350.00

V3 to V5 Upgrade License Fees	
Line Item	Price
5 Additional Infinity v3 CIS Licenses	\$ 32,500.00
Advanced 25 th Anniversary Discount	(\$ 8,125.00)
Total	\$ 24,375.00

V3 to V5 Upgrade Annual Fees	
Line Item	Price
Infinity v5 Platform	\$ 13,650.00
Infinity Cloud Hosting	\$ 77,416.00
REST API	\$ 20,000.00
REST API Discount	(\$ 20,000.00)*
5 Additional Infinity CIS Licenses	\$ 8,125.00
Total	\$ 99,191.00**

*This REST API discount is perpetual.

**Annual fees outlined here are in addition to 2023 recurring fees and any other existing agreements between the parties.

Note: Additional services required by Corona through the end of Post Live and approved through the Change Control Process (e.g. requirement changes or changes to the project scope) will be billed at a rate of \$250/hour. Services required after that period will be billed in accordance with the Support and Maintenance Agreement.

Note: Existing Maintenance and Support fees are reflected in the MSA.

Payment Milestones

Professional Services:

Reference	Milestone – Corona will be billed according to the completion of the Milestone	Invoice Amount	Del # from Appendix
CT1	Contract Signing	\$ 71,270.00	n/a
MP1	Installation of Infinity CIS	\$ 28,000.00	12
MP3	Delivery of Functional Discovery Workshops	\$ 28,000.00	31
MP4	Initial Conversion Rollout	\$ 28,000.00	32
MP5	Initial Configuration Rollout	\$ 56,080.00	35
MP6	Completion of Core Team Training	\$ 28,000.00	36
MP7	Data Refresh #2 Load (Functional Testing)	\$ 28,000.00	39
MP8	Data Refresh #3 Load (ITC)	\$ 28,000.00	43
MP9	Data Refresh #4 Load (UAT)	\$ 28,000.00	44
MP10	Data Refresh #5 Load (Go-Live)	\$ 28,000.00	51
	Total Services	\$ 351,350.00	

License Fees:

Fee Type	Milestone	Invoice Amount
Additional CIS Licenses	100% due on Contract Signing	\$ 24,375.00

Annual Fees:

Fee Type	Milestone	Invoice Amount
Infinity v5 Platform	100% due on Infinity CIS v5 Go Live.	\$ 13,650.00

Fee Type	Milestone	Invoice Amount
Infinity Cloud Hosting	100% due on Infinity CIS v5 installation to a non-production environment.	\$ 77,416.00
Additional CIS Licenses	100% due on Contract Signing	\$ 8,125.00

Termination:

Unless Advanced and/or Corona exercises its right to terminate this quote due to material breach or default, Advanced must provide, and Corona must purchase, Services from Advanced for the items defined within this quote.

If Corona and/or Advanced exercises its right to terminate this quote due to material breach or default, or Corona and/or Advanced terminates this quote without cause,

Corona's obligation includes the following:

1. Provide notice of 10 calendar days for termination without cause;
2. Return the Software to Advanced and certify, under the hand of a duly authorized officer of the Organization, that all copies of the Software or any part thereof, in any form, within the possession or control of the Organization have been returned to Advanced. (if applicable)
3. Complete payment for services performed and expenses incurred prior to termination including:
 - a. Any amounts previously invoiced but unpaid;
 - b. Fees for services performed through the termination date which has not been invoiced; and
 - c. Any approved Travel and Living costs.

Advanced's obligation includes the following:

1. Provide notice of 10 calendar days for termination without cause.

Under no circumstances shall Advanced be liable for any special, indirect, consequential, punitive or incidental damages of any kind and shall not be liable for loss of profits, works stoppage, system failure or malfunction, loss of data or any other damages or losses in connection with this statement of work, even if Advanced has been advised of the possibility of such damages. In any event, Advanced shall not be liable to pay any amount, in the aggregate, that is greater than the fees received by Advanced under this statement of work.

Approvals

IN WITNESS WHEREOF the parties hereto have duly executed this Scope of Work to be effective as of the Effective Date.

N. HARRIS COMPUTER CORPORATION

Per:

Name: Hari Subramaniam

Title: Executive Vice President

Date:

City of Corona

Per:

Name:

Title:

Date:

Appendix – Table of Responsibilities (Deliverables)

Del #	Task Per SOW	Subtask Per SOW	Name	Deliverable Description/Definition	Deliverable Lead
1	1	1.2	Weekly and Monthly Status Meetings & Reports	Project meetings to be attended by Advanced and Corona. Project core team members to discuss work in progress, issues, risks, actions, near-term planned activities and associated resource commitments. Status reports to document project progress.	Advanced
2	1	1.3	Quarterly Sponsor Meeting	Meeting attended by Advanced and Corona Project Manager and Project Sponsors to review project status.	Advanced
3	3	3.1	Environment ready for Software Provisioning	Application and database server (production and test) provisioned, and the operating system and database software have been loaded.	Advanced/ Corona
4	3	3.1	Project Kick-Off Meeting	Kick-off meeting held with the project team.	Advanced
5	3	3.1	Draft Project Schedule	Initial draft Project Schedule delivered at project kickoff meeting. Project Schedule updates performed throughout the project. The schedule is updated for refinements to tasks, and percent complete inclusive of resource updates and timeframe updates. Both parties will commit to staffing and resources to meet a rolling 3-month window.	Advanced
6	3	3.1	Risk Management Plan	Plan that defines how project risks will be logged, prioritized, assigned and managed to closure using a jointly agreed resolution strategy. Risk Log will be reviewed at project status meetings.	Advanced
7	3	3.1	Communication Plan	Plan that defines the Project Strategy for communicating internally within the Project Team.	Advanced
8	3	3.1	Change Management Plan	Plan that defines the strategy for communicating with employees and externally.	Corona
9	3	3.1	Change Control Process	Process that defines how changes to project scope will be logged, approved, and managed as agreed to by both parties.	Advanced
10	3	3.1	Training Plan	Plan that defines Corona resources to be trained, the courses to be delivered, materials, locations, facilities and other resources.	Advanced
11	3	3.1	Test Plan	Plan that defines Corona's testing approach.	Advanced
12	3	3.1	Infinity CIS Server Provisioning	Provisioning of Infinity CIS on Infinity Cloud Platform	Advanced
13	3	3.1	Access Training	Access to client instances in Infinity Cloud Platform training for technical personnel.	Advanced
15	3	3.1	Training Courses Syllabus	Document that outlines the duration, prerequisites and topics to be covered during the Advanced delivered standard training courses.	Advanced
16	3	3.1	Project Team Contact List	Project listing of all Advanced and Corona project team members' contact information.	Advanced
17	3	3.1	System Overview	Infinity CIS system overview demonstration	Advanced
18	3	3.1	Issues Tracking Tool Overview and Set up	Advanced will provide Corona with an overview of the Issues Tracking Tool, the online tool for documenting and tracking issues as part of the overall implementation. Corona users will be provided with user ids and passwords which also provide access to the Software Entity relationship diagrams and the Data Dictionary.	Advanced

19	3	3.1	Functional and Data Conversion Discovery Workshop Agendas	Documents that outline the business and conversion processes to be discussed during the Functional and Data Conversion Discovery Workshops.	Advanced
20	3	3.2	Data Requirements for Functional Workshops	Corona to provide business process documentation as identified in Subtask 3.2.	Corona
21	3	3.2.1	Functional Discovery Analysis Workshop	Sessions that will assist Advanced in learning Corona business processes and educating Corona about the features and limitations of the software. Advanced will lead the sessions with Corona business process experts participating.	Advanced
22	3	3.2.1	Functional Discovery Document	Document that captures all learning and understanding gained in the Functional Discovery Analysis Workshops. Document will serve as a template for configuring the software.	Advanced
23	3	3.3	Interface/Enhancements Discovery Workshop Agendas	Documents that outline the items to be discussed during the Interface/Enhancement Discovery Workshop.	Advanced
24	3	3.3	Interfaces/Enhancements Workshop	Session that will aid Advanced in understanding modification requirements and the third-party systems' interfacing capabilities to determine the best approach for interfacing with the identified third party systems.	Advanced
25	3	3.3	Business Requirements Document	BRD and/or Use Case Documentation for interfaces/Enhancements identified in Task 2.1 and 2.2. Rollout document for interfaces identified in Subtask 2.2.	Advanced
26	3	3.4.1	Reports Discovery Workshop	Sessions to review the reporting requirements of Corona. Advanced will lead the sessions with Corona business process experts participating.	Advanced
27	3	3.4.1	Reports Analysis Spreadsheet	Document that lists all reports provided by Corona and designates those reports that are standard within Infinity CIS and those that require modification.	Advanced
28	3	3.4.2	Bill Print Discovery Workshop	Session to review of all bill print types, notices, receipts including a review of the bill printing and bill re-printing processes. Advanced will lead the sessions with Corona experts participating.	Advanced
29	3	3.4.2	Bill Print Specification	Specification for bill print design	Advanced
30	3	3.5.1	Initial Data Conversion Load	Loading of initial conversion by Advanced on Corona's system.	Advanced
31	3	3.5.1	Baseline Accounts	Corona, with Advanced's assistance will identify baseline accounts to be used for testing.	Corona
32	3	3.5.1	Data Validation Results	Report that documents the results of the agreed upon conversion validation parameters for both the source and target data.	Advanced
33	3	3.5.1	Initial System Configuration Rollout	Configuration of the control forms and rates by Advanced based on the Functional Discovery document.	Advanced
34	3	3.5.2	Initial CIS Upgrade Conversion, Data validation Testing	Advanced will convert Corona's V3 data load into Corona's CIS Infinity Environment. Advanced will supply data a data validation report confirming both version 3 and Infinity CIS are in balance and will release the system for testing by Corona	Advanced
35	3	3.6	Training Agendas	Standard Training Agenda for each training course identified in the Training Plan.	Advanced
36	3	3.6	Core Team Training	Execution and completion of Core Team training per the Training Plan. Training will include the Issues Tracking Tool training.	Advanced
37	3	3.7	Custom Reports Delivery	Delivery of custom reports identified in the Reports Analysis Spreadsheet.	Advanced
38	3	3.8.1	Interface Configuration, Testing and Rollout	Configuration, testing, and rollout of configuration type interfaces that have been identified in Task 2.2 of this SOW.	Advanced
39	3	3.9.1	Functional Test - Data Conversion Data Load & Validation	Loading of conversion data by Advanced on Corona's system. Includes audit report that documents the	Advanced

				results of the agreed upon conversion validation parameters for both the source and target data.	
40	3	3.9.1	Generic Test Scripts	Generic Integration Test scripts provided by Advanced to test system functionality.	Advanced
41	3	3.9.1, 3.9.2, 3.9.3.	System Testing	Corona to conduct testing as outlined in the Test Plan, document test results (pass/fail) and log any issues in the Issues Tracking Tool for resolution by Advanced.	Corona
42	3	3.9.1	Rates Testing Matrix	Document outlining all necessary rates and rate scenario's to be tested. Corona is responsible for testing and confirming all rates and rate scenarios are accurate and reflect the billing requirements of Corona.	Advanced
43	3	3.9.2	Build Releases (ITC1)	Installation of new builds on Corona's system which include Corona's modified software and interfaces.	Advanced
44	3	3.9.2	Integration Test - Data Conversion Data Load & Validation	Loading of conversion data by Advanced on Corona's system. Includes audit report that documents the results of agreed upon conversion validation parameters.	Advanced
45	3	3.9.3	User Acceptance Test - Data Conversion Data Load & Validation	Loading of conversion data by Advanced on Corona's system. Includes audit report that documents the results of the agreed upon conversion validation parameters for both the source and target data.	Advanced
46	3	3.10	End User Training, Signoff and Attendance Report	Execution and completion of End-User training per the Training Plan. Each training session will have an Attendance Report.	Advanced
47	3	3.11	Go/No Go Criteria Document	Document that identifies the criteria that will be adhered to enable cutover to Production to proceed. It includes metrics to evaluate project management readiness, business solution testing readiness, business readiness, IT infrastructure readiness and reorganization/people readiness.	Advanced
48	3	3.11	Go / No Go Decision Document approved for Go Live	Document that defines the outcomes of application readiness based on the defined Go/No Go Criteria document and Cutover Plan defined. The result will be a decision to Go-live or to identify issues that will need to be resolved prior to Go-Live or can be deferred to post go-live. The decision to transition to Go Live will be approved when the items defined in the Cut-Over and readiness assessment has been successfully achieved and there are no significant agreed upon issues that will impact transition to Production.	Advanced
49	3	3.11	Cutover Plan	Document that defines steps and responsibilities of Advanced and Corona during transition to Production. Includes steps to achieve system balance and includes a conversion cutover plan.	Advanced
50	3	3.12	Go Live - Data Conversion Data Load & Validation	Loading of conversion data by Advanced on Corona's system. Includes audit report that documents the results of the agreed upon conversion validation parameters for both the source and target data.	Advanced
51	3	3.12	Go Live	System is operating and being used. Balancing of legacy and Advanced CIS has been validated and signed-off by Corona.	Advanced
52	3	3.13	Completion of Post Live Support	Conclusion of Post live support period, which includes remote and online video conferencing.	Advanced
53	3	3.13	Customer Success Transition Meeting	A transition meeting to transfer from the project implementation phase to the support phase of the contract.	Advanced