

Appendix A Technical Specifications
95880 eGain Licenses Cloud Solution and Implementation Services

1 Scope of Work

The purpose of this Invitation to Negotiate (the "ITN") is to evaluate and select a vendor for eGain licenses – cloud solutions and implementation services that can provide the items contained within Appendix B – Response Workbook and provide the best value to JEA (the "Work" or "Services"). "Best Value" means the highest overall value to JEA with regards to pricing, quality, design, and workmanship.

JEA is seeking to conduct an eGain product pilot, for our Call Centers. Our goal is to add additional functionality to centrally manage customer emails, chats, call tracking and their knowledge base. JEA has already selected the eGain for Cisco solution, a cloud application. JEA expects implementation to be complete within 90 days of the notice to proceed.

Our agreement needs to allow us the use of the following modules:

Case Manager (Call Track): IPCE-EGAN-PRD-BDL (Case Manager)

Chat: IPCE-EGAN-PRD-BDL (Chat)

Mail: IPCE-EGAN-PRD-BDL (Mail/Social Agent)

KnowledgeAgent +AI: IPCE-EGAN-PRD-BDL (KnowledgeAgent)

Secure Mail: IPCE-EGAN-SGL-FTR (Secure Messaging)

Fax: IPCE-EGAN-SGL-FTR (Fax & SMS)

Webforms: IPCE-EGAN-PRD-BDL (Mail/Social Agent)

The equipment list and details are on Appendix B Response Workbook. Bidder shall submit pricing that includes inside shipping for all items to: Brooke Garland at: garljb@jea.com. Pricing submitted shall include any other associated costs. No additional fees shall apply.

Key Deliverables:

- Access and full use of the cloud eGain modules: Case Manager (Call Track), Chat, Mail, KnowledgeAgent +AI, Secure Mail, Fax & SMS, and Webforms
- Ability to track all inbound customer emails
- Ability to track all outbound customer emails
- Centralization of emails into a single inbox per queue, where multiple users can access and process responses
- Fax to email implemented
- Configuration of up to five (5) email queues – Residential, Commercial, Outage, Project Outreach and Water counter, *for each queue (emails/fax/Webforms)*
- The ability for emails to be pushed to next available agent following a prioritization of calls #1 priority, emails #2
- Chat:
 - Integrate chat into JEA.com
 - Ability to limit sessions based on chat agent availability
- Knowledge Base:

- Guided help powered by AI reasoning technology and case based reasoning
- Manage service levels across all channels / queues (calls, chat, and then email will be the sequence of priority).
- Standardization of processes across all channels / queues
- No net decrease in employee productivity: Gross Productivity for Commercial has been 73.88% and 79.19% for Residential. Gross Productivity includes these phone states: Call Center Phones, Hold, Wrap, Idle, Aux (OB), Research, Correspondence, Differed and MyWay Offline.
- Pilot of email and chat to be assessed at 90 business days after notice to proceed?
- On-site training for selected JEA team members (included as part of the implementation cost)
- JEA Administrator shall have access to all JEA configuration

Project detailed requirements:

Requirement Number	Requirements
E1.1	Ability to have predefined workflows to manage incoming email
E1.2	Ability to have predefined workflows to manage webform inquiries
E1.3	Ability to have service level agreement (SLA) triggers to automate email routing
E1.4	Ability to send auto-responses
E1.5	Ability to recommend responses to agents
E1.6	Ability to track all customer queries
E1.7	Ability to provide multichannel interaction history to agents
E1.8	Ability to access to the centralized knowledge base
E1.9	Abilityfor JEA agents to contribute to the knowledge base
E1.10	Ability to have real-time alarms/notifications when system is unavailable.
E1.11	Ability to authenticate the customer before they are allowed to view confidential information.
E1.12	Ability to route, track, and respond to faxes
C1.1	Ability to support mobile devices
C1.2	Ability to support multiple languages
C1.3	Ability to end-of-chat survey to elicit customer feedback
C1.4	Ability to allow JEA agents to conduct 3-5 chats simultaneously
C1.5	Ability to allow JEA agents to exchange text messages
C1.6	Ability to allow JEA agents to exchange files
C1.7	Ability to allow agents to exchange web pages

C1.8	Ability to allow agents to exchange knowledge base articles
C1.9	Ability to display FAQs and other useful content while the customer is waiting for the agent to join the chat session.
C1.10	Ability to rich text editor to enable customers and agents to share clickable hyperlinks and format messages
C1.11	Ability to display special messages in the case of off-hour requests, waiting for agent to join chat, error during chat, exit, or abandon
C1.12	Ability to print, save, and email session transcripts
C1.13	Ability to make proactive offers for assistance, based on rules
C1.14	Ability to configure look and feel to match company branding.
C1.15	Ability to set up various types of authentication options
C1.16	Ability to integrate with Cisco Finesse
C1.17	Ability to have auto spelling checker
C1.18	Ability to change the number of chats an agent can handle at a time
C1.19	Ability to assign chats automatically to available agents using load balancing
C1.20	Ability to force agents to enter a resolution code for the chat before completing it.
T1	Develop a mechanism to write a customer contact back to Oracle CC&B version 4.1 (service is available to configure API)
T2	Compatible with UCCE 11 on Premise at JEA

2 Technical Requirements and Information

JEA utilizes the following systems Microsoft Active Directory 2008/12 and Microsoft Exchange 2007. The systems use a standard API or SDK for building interfaces to 3rd party applications

JEA Information Security for Cloud Hosting

2.1 Threat Reduction:

- SOC 2 Compliance
- The Company Data must only be stored within the Continental United States.
- Ability to address network and host intrusions, DDoS, DoS, EDos
- Allow for proper network and hosting segregation between customers
- Having proper network access control and in-transit data encryption
- Industry standard intrusion detection and prevention systems
- Ability to secure and compartmentalize the virtualization layers
- Applications used /developed for JEA are patched and managed regularly with notification to JEA of any necessary downtime
- Provide unauthorized access or disclosure notification

- Encryption of data storage when and where possible
- Use Identity and Access Management to enforce access rights and role-based permissions
- Ability to respond to JEA set SLA's in the event of Cloud Hosting issues

2.2 JEA Application Compatibility Cloud Hosting:

- Allow for integration with UCCE 11.0 and verified full compatibility
- Allow for integration with Cisco Finesse 11.0. and verified full compatibility
- Ability to write back customer contact information to JEA Billing system (Customer Care and Billing version 2.4.0.2). (Web service information will be provided by JEA for integration).

2.3 JEA Disaster Recovery site maintenance for Cloud Hosting

- Must have the ability to provide standby/backup servers in different locations
- Must have the ability to respond to JEA SLA time for data restoration.

2.4 CC&B Customer Contact

- JEA will provide the selected implementer the appropriate information so that they can develop the mechanism to write a customer contact back to Oracle CC&B

3 Project MUST HAVES for successful completion

- Proposal for the minimum period required for the use / access of the eGain Case Manager (Call Track), Chat, Mail, KnowledgeAgent +AI, Secure Mail, Fax and Webforms modules by twenty (20) of JEA call center employees. *Proposal is for a period of one (1) year.*
- Acknowledgement and agreement that all listed requirements will be met to JEA's satisfaction
- Customer contacts will be automatically created for each transaction into JEA's Oracle CC&B system. Implementer will be expected to complete all work needed to create the Customer Contact for each type of transaction. The selected vendor will be provided the needed information to successfully call our service
- As-Built of the workflow infrastructure - Visio diagrams of the data flow
- An onsite training plan including curriculum and number of sessions. Training needs to include eGain's processes and procedures required for full support.
- A detailed project plan including tasks and timelines; JEA would like to be operational by
- Regular updates on key tasks and deliverables
- Identification/updates on project risks and issues as well as the plans for mitigations
- Vendor may need to be onsite during implementation of key requirements, working closely with the business to ensure project deliverables are met. *Please include travel expenses on your proposal according to JEA's Travel Policy attached to this solicitation. IF NOT onsite, vendor must provide resource federal background check based on JEA's guidelines*
- Vendor is expected to be onsite at JEA's offices during the testing and training sessions. *Please include travel expenses on your proposal*
- There will not be any emails lost
- System needs to provide Service Level reports
- System needs to provide Employee Productivity reports
- Email functionality must not have any negative impact to current call routing
- Customer Data is secure and all of the PII data must be masked
- JEA technical personnel (admin) will have full access to the JEA configuration

Appendix B - Minimum Qualification Form
#95880 eGain Licenses Cloud Solution and Implementation Services

GENERAL

THE MINIMUM QUALIFICATIONS SHALL BE SUBMITTED ON THIS FORM. IN ORDER TO BE CONSIDERED A QUALIFIED BIDDER BY JEA YOU MUST MEET THE MINIMUM QUALIFICATIONS LISTED BELOW, AND BE ABLE TO PROVIDE ALL THE SERVICES LISTED IN THIS SOLICITATION.

THE BIDDER MUST COMPLETE THE BIDDER INFORMATION SECTION BELOW AND PROVIDE ANY OTHER INFORMATION OR REFERENCE REQUESTED. THE BIDDER MUST ALSO PROVIDE ANY ATTACHMENTS REQUESTED WITH THIS MINIMUM QUALIFICATIONS FORM.

PLEASE SUBMIT THE ORIGINAL AND THREE COPIES OF THIS FORM AND ANY REQUESTED ADDITIONAL DOCUMENTATION WITH THE BID SUBMISSION.

BIDDER INFORMATION

COMPANY NAME: _____

BUSINESS ADDRESS: _____

CITY, STATE, ZIP CODE: _____

TELEPHONE: _____

FAX: _____

E-MAIL: _____

PRINT NAME OF AUTHORIZED REPRESENTATIVE: _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

NAME AND TITLE OF AUTHORIZED REPRESENTATIVE: _____

MINIMUM QUALIFICATIONS:

- The Respondent shall be a Cisco Partner. JEA will verify this with Cisco. The Respondent shall provide two (2) client references within the last three (3) years as of the response due date in which the Company successfully implemented of a cloud 'eGain for Cisco' solution similar to JEA. The products implemented must have included: Case Manager, Chat, Mail/Social Agent, Knowledgebase, Fax & SMS and Webforms.

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APPENDIX B RESPONSE FORM
95880 EGain Licenses Cloud Solution and Implementation Services

Submit via email along with other required forms to: garljb@jea.com

Company Name: _____

Company's Address _____

Phone Number: _____ FAX No: _____ Email Address: _____

BID SECURITY REQUIREMENTS

- ☒ None required
☐ Certified Check or Bond (Five Percent (5%) of Total Bid Price)

TERM OF CONTRACT

- ☐ One Time Purchase
☒ Annual Requirements 1 yr. term

SAMPLE REQUIREMENTS

- ☒ None required
☐ Samples required prior to Bid Opening
☐ Samples may be required subsequent to Bid Opening

SECTION 255.05, FLORIDA STATUTES CONTRACT BOND

- ☒ None required
☐ Bond required 100% of Bid Award

QUANTITIES

- ☐ Quantities indicated are exacting
☒ Quantities indicated reflect the approximate quantities to be purchased Throughout the Contract period and are subject to fluctuation in accordance with actual requirements.

INSURANCE REQUIREMENTS

Insurance required

PAYMENT DISCOUNTS

- ☐ 1% 20, net 30
☐ 2% 10, net 30
☐ Other _____
☐ None Offered

ENTER YOUR RESPONSE FOR THE ITN 95880	TOTAL BID PRICE
Total Bid Price for ITN 95880 EGain Licenses Cloud Solution and Implementation Services (Transfer total from Appendix B Response Workbook)	\$ _____

☐ I have read and understood the Sunshine Law/Public Records clauses contained within this solicitation. I understand that in the absence of a redacted copy my proposal will be disclosed to the public "as-is".

RESPONDENT'S CERTIFICATION

By submitting this Response, the Respondent certifies that it has read and reviewed all of the documents pertaining to this Solicitation, that the person signing below is an authorized representative of the Respondent's Company, that the Company is legally authorized to do business in the State of Florida, and that the Company maintains in active status an appropriate contractor's license for the work (if applicable). The Respondent also certifies that it complies with all sections (including but not limited to Conflict Of Interest and Ethics) of this Solicitation, and that the Respondent is an authorized distributor or manufacturer of the equipment that meets the Technical Specifications stated herein.

We have received addenda _____

Handwritten Signature of Authorized Officer of Company or Agent _____ Date _____

_____ through _____

Printed Name and Title



PROCUREMENT SERVICES PROCEDURE: OS A0500 PS 120B Contractor Travel

TITLE: Travel Approval and Expense Reimbursement (Contractor)

CREATION DATE: May 26, 1988

REVISED: April 1, 2010

POLICY: JEA's travel requirements for contractors parallel the same travel guidelines in OS A0500 PS 120A for JEA Employee Travel. JEA is authorized to provide reimbursements for certain expenses incurred by a non-JEA employee upon the traveler meeting all the requirements stated in this procedure. The proper approval process must be followed for a non-JEA employee to travel and receive reimbursements for expenses incurred.

OBJECTIVES: Provide assistance to the non-JEA traveler in making travel arrangements and filing a travel claim for reimbursement of travel expenses occurred.

ASSIGNMENT: Director, Procurement Services is responsible for maintenance and implementation of this procedures. All using employees are responsible for compliance herewith.

PROCEDURE:

I. TRAVEL REQUESTS - Contractors must request approval for travel on official JEA business prior to commencement of travel. A Travel Request/Reimbursement Form is located in **Quest, Enabling Processes, Travel** and must be completed and submitted to the traveler's approving authority before travel begins.

II. GENERAL TRAVEL GUIDELINES

- A. **Constructive Point of Origin** - The application of the constructive point of origin regulation will ensure that the traveler travels the shortest reasonable distance on business. Travel shall be deemed to have begun at the usual place of business or residence, or the place where travel actually began, whichever is less.
- B. **Constructive Travel Time** is the time the traveler actually departs for his/her destination, or at the latest time the traveler could reasonably have departed in order to arrive at his/her destination in time to accomplish the official business, whichever is later. The same applies to the return back to the point of origin.
 - 1. Common Carrier (excluding rental automobile) Travel Time begins two hours prior to the time the traveler's conveyance actually departs.
 - 2. Motor vehicle (including rental automobile) Travel Time begins at the time travelers actually begin driving to their destination.
 - 3. If a traveler conducts personal business during official travel, the personal business shall be considered to have been conducted at the beginning or at the end of the travel.

C. Transportation

1. The traveler requesting approval to travel shall choose the most economical means of transportation, considering the nature of the business, the traveler's time, cost of transportation, meals, lodging and incidental expenses required.
2. Reimbursement shall be made only for travel performed over usually regularly traveled routes to the destination. When travel is by indirect route for the traveler's own convenience, reimbursement for expenses shall be based only on such charges as would have been incurred over the usually traveled route.
3. If the total miles from the departure point to destination exceeds 400 miles round trip, the mileage reimbursement for use of a private motor vehicle shall be limited to the lesser of:
 - a. IRS-authorized mileage rates described in Section 106.706 of the Ordinance Code, City of Jacksonville; or
 - b. the lowest airline common carrier coach fare available to the nearest airport plus IRS-authorized mileage rate per mile from the airport to the destination.

IV. AUTHORIZED EXPENSES

A. Airplane

1. Travel by Common Carrier shall be reimbursed at the lowest coach fare rate available (except that the first class rate is authorized if coach fare is not available). The Common Carrier shall complete The Certification of Unavailability of Coach Accommodation (Appendix A)
2. Reservations for a Saturday night stay over are encouraged if it results in a net savings after considering all incremental travel related expenses.
3. Reimbursement for rented aircraft shall be based on the hourly rental rate for the aircraft, including fuel, if the cost of renting the aircraft can be demonstrated to be less than the lowest available common carrier coach fare.
4. A copy of the ticket and itinerary must be submitted along with the expense statements.

B. Automobiles

1. If travel is by private automobile, reimbursement shall be based on IRS authorized mileage rate in existence at the time of travel. All mileage shall be completed from the constructive point of origin to the point of destination. Vicinity mileage incurred while driving on official business may also be reimbursed. Current mileage rates are listed on **Quest, Enabling Processes, Travel**.
2. No other reimbursement for expenses related to the operation, maintenance and ownership of a vehicle shall be allowed when a private motor vehicle is used on public business.

C. Car Rental

1. Rental cars shall be approved only if taxis or other means of transportation are less economical or otherwise impractical. Avis Car Rental is JEA's current rental car agency. Complete rental car information on **Quest, Enabling Processes, Travel**.
2. Every effort shall be made to coordinate travel so that travelers share a rental car and thereby eliminate multiple cars at the same location.
3. Travelers shall use the Compact (Class B) vehicles unless the number of passengers or the volume of equipment makes the compact class impractical.

4. Personal accident insurance purchased by the traveler will not be reimbursed by JEA.
5. A copy of itemized rental car charges will be made and submitted with the expense statement.

D. Lodging

1. Reasonable reimbursement will be made for the cost of overnight lodging when a traveler is away from his/her place of residence. Travelers shall select lodging which is the most economically available, consistent with the duties being performed.
2. Travelers will be reimbursed for a single room rate; double occupancy rates may be obtained if two travelers share a room.
3. An extended stay facility may be obtained, however the expense must be reasonable and the daily cost shall not exceed \$100 per night.
4. Travelers must document all lodging expenses with itemized statement and paid receipt from lodging facility. A copy of the receipt must be submitted with the expense statement.

E. Meals

1. IRS per diem rates vary from City to City. The maximum rate allowed for JEA travel is \$50 per day. You may travel in cities whose IRS per diem rates are less than JEA's per diem rates. If that is the case, the lesser rate applies. There are no meal reimbursements over the maximum JEA rate of \$50 unless travel is international. International travel is calculated at twice the JEA per diem rate of \$50.
2. Per diem is reimburseable as follows:
 - a. Breakfast - when Travel Time begins before 6:00 a.m. and extends beyond 8:00 a.m.
 - b. Lunch - when Travel Time begins before 12:00 noon and extends beyond 2:00 p.m.
 - c. Dinner - when Travel Time begins before 6:00 p.m. and extends beyond 8:00 p.m.
 - d. International Travel – for travel outside of the United States, the per diem rate is doubled to \$100 per day.
3. The maximum JEA per diem rate of up to \$50 will be paid for an entire day when Travel Time for that day begins before 6:00 a.m. and extends beyond 8:00 p.m. Lesser IRS rates apply if applicable to your travel city.
4. Per diem rates may not be claimed for meals (except those provided by common carrier transportation) made available without specific charge at a seminar, conference or training session.
5. Current per diem for various cities is located on **Quest, Enabling Processes, Travel.**

F. Telephone Calls

1. Communication expenses, necessary to conduct official JEA business shall be allowed as a reimbursable expense.
2. Personal long distance phone charges shall be allowed as a reimbursable expense when travelers must call family members, or caretakers for dependents, to tell of travel delays. Any other routine or non-emergency personal calls shall be at the expense of the traveler and shall not be reimbursed.
3. A receipt documenting the telephone charges shall be submitted with the Travel Expense Statement.

G. Incidental Transportation Expenses

The following expenses incidental to transportation of the traveler may be reimbursed:

1. Taxi fare
2. Ferry fares, bridge, rail and tunnel tolls
3. Storage and parking fees
4. Reasonable tips for transportation of baggage (not to exceed \$1.00 per bag per transfer/2 bags maximum). Receipts not required.

V. TRAVEL REIMBURSEMENT:

- A. JEA will reimburse the contractor in accordance with the payment terms and conditions as outlined in the company's contract or purchase order. All invoices must be submitted to Travel Services for auditing purposes. Once approved, the traveler's claim will be submitted to Accounts Payable for payment. A Direct Deposit form must be completed for payment. Form located on **Quest, Enabling Processes, Travel**.
- B. JEA will only reimburse the contractor for travel expenses that are documented with receipts submitted with the expense statement.
- C. The traveler's copy of the itinerary, ticket stubs, detailed paid hotel bill, rental car receipt, parking receipts, toll receipts, storage receipts, taxi receipts, telephone charges receipt, must accompany the request for reimbursement.

VI. DOCUMENTATION AND FORMS REQUIRED:

The Contractor's Travel Request/Reimbursement Form shall include, but not be limited to:

- A. Name of each traveler
- B. Destination of the traveler (place of departure and destination)
- C. Dates encompassed by the travel (the time & date of departure and the time & date of return)
- D. Each day of travel will be entered in a separate column/line. Items of travel applicable to that day will be entered on the appropriate column/line. The cost of transportation (air, rental car) may be entered on day 1 of the travel.
- E. Per diem or meal allowance will be claimed as provided in Section IV. E. of this document. Subsistence rates for eligible meals will be entered in the column/line of the day claimed.
- F. Traveler shall include the actual miles traveled on official business. Current IRS mileage rates may be viewed on **Quest, Enabling Processes, Travel**.
- G. All other expenses associated with travel are to be itemized and entered on the specific day incurred on the appropriate column/line of the form.
- H. A Direct Deposit form must be completed and submitted to Accounts Payable. A Direct Deposit Form is located on **Quest, Enabling Processes, Travel**.

SIGNED: _____ John P. McCarthy

EFFECTIVE DATE: _____ April 1, 2010

Revised: 6/25/07; 12/11/2001; 6/18/2001; 11/29/200