

## RFI Cover Sheet

Response to  
Workforce Information Technology Project  
A Florida Workforce Automation SaaS  
13-RFI-001-LJ

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# A Florida Workforce Automation SaaS

Tuesday, May 14, 2013

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## RFI - Executive Summary

Complete Technology Solutions (CTS) has undertaken the responsibility to develop and leverage self-service technology for Workforce Development Agencies. The technology is geared for Social Service organization implementation, specifically Workforce Development. It is our long term goal to develop advanced, user friendly Software, augmented by self service hardware.

Complete Technology Solutions (CTS) has been providing uninterrupted Workforce Development Technology services since 2000. CTS has engaged and interacted with numerous Workforce Development vendors and service providers throughout Florida. Our consulting and service provider knowledge has allowed us to gain a unique understanding of the challenges Workforce Development Boards face. We have used this knowledge to build and maintain tools that automate areas of the One-Stop facility and management programs. Currently ATLAS is operational in the following Workforce Board Regions:

- Pasco Hernando Workforce Board (16)
- Citrus, Levy and Marion Workforce Board (10)
- WorkNet Pinellas (14)
- Tampa Bay Workforce Alliance (15)
- Chipola Regional Workforce Board (3)
- Suncoast Workforce Board (18)
- The Workforce Development Board of Okaloosa and Walton Counties (2)

For the purposes of this RFI - following is an example of some of the services that the ATLAS platform can bring to the table. It is based on a recent proposal submitted and contains a good cross section of the ATLAS modules and service.

We feel that our expertise automating not only the paper process but many other areas of the One-Stop is unmatched by any vendor within Florida. We look forward to demonstrating how our system can be utilized.



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## Project Core Staff

### ***Maurice Ryman***

Project Manager

Over 13 years uninterrupted, technology based consulting service for various Workforce Boards throughout the State of Florida.

### ***Bill Pierson***

Lead Programmer

Over 15 years of custom programming knowledge with 10 years of Workforce Development exposure. Areas of expertise include PHP and PERL development. Bill has built many customized interface programs for OSMIS, EFM, FloridaJobs.org, as well as customized web based applications for Workforce Development use.

### ***Brandon Cordell***

Lead Programmer

Over 15 years of custom programming knowledge. Areas of expertise include graphic design, layout and PHP, MySQL database management, EXTJS framework, CCMS engineering and development.

### ***Daniel Nolan***

Lead Programmer

Over 10 years of knowledge in structured framework PHP development. Daniel excels in streamlined, efficient, and effective user interfaces. Daniel has advanced expertise in the Cake development framework, JQuery UI and other cutting edge PHP programming technologies.



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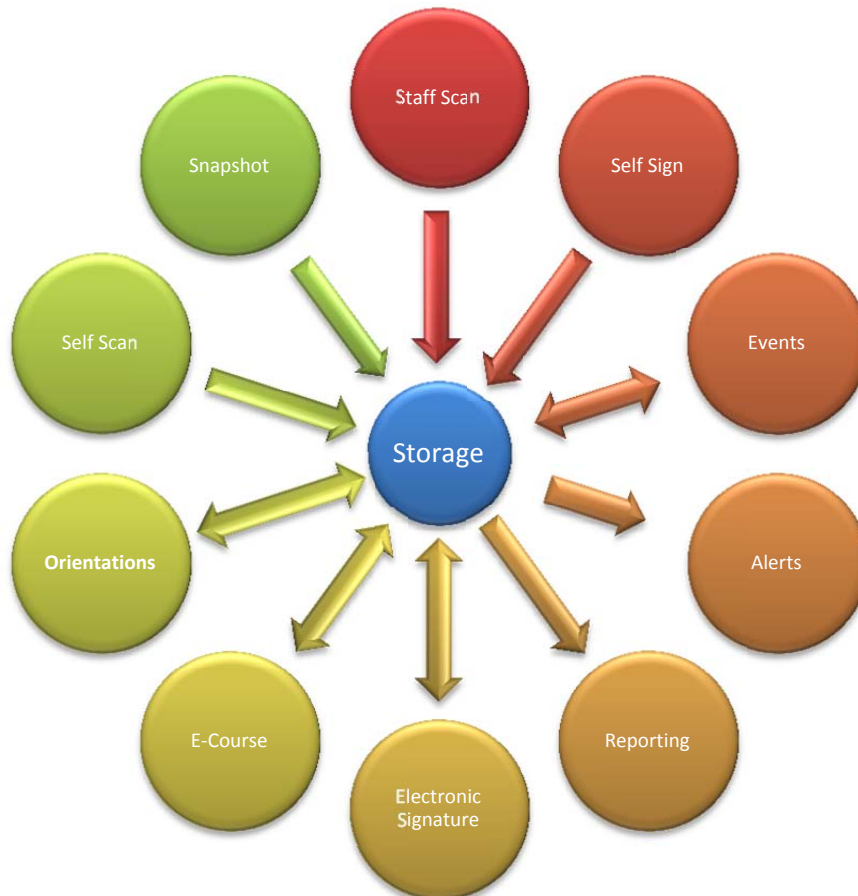
## Scope of Services



Automated Tracking, Linking and Archiving Solution

**ATLAS** is a highly customizable web-based platform designed from the ground up to streamline workflow and service delivery methods for Workforce Development agencies. **ATLAS** incorporates technology that empowers Workforce Boards to efficiently track customers, archive activity and documents and inclusively link all information utilizing a robust and centralized application.

ATLAS is the ONLY product of its kind exclusively built for the Workforce Development Industry.



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## Storage (e-File) - Document storage and management system

- Secure centralized SQL powered, web-based document storage and retrieval system
- E-File can accept activity and document data from many ATLAS modules, including: Self Sign, Staff Scan, E-course, Self Scan, Orientations
- Stores detailed records of customer activity and document data
- Build customized reports and document packages for customers
- Integrate ad-hoc databases into Storage
- Record details gives you a snapshot of all customer activity and Storage documentation
- Search for documents and customer activity by ssn, last name and first name
- Adaptive search fields (populates possible search criteria as you start typing)
- Filter documentation by type of scanned document
- Activity log and document viewer screen
- Quick report access. Generate pre-defined reports for customer
- Search Storage by keyword or specific category
- Detailed document viewer module. Select multiple documents to open and print
- Update customer detail information
- “Add to Storage” quick link. Add any type of locally stored or scanned documents to a storage record. Utilizes “On the Fly” document conversion to convert documents of different formats into pdf’s
- Storage can accept activity and document data from all ATLAS modules
- Archive customer ESI for future module acknowledgement reference



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### Staff-Scan Staff scanning system

- Scan documents via high speed or desktop scanners . Ricoh, KonicaMinolta, Canon, KyoceraMita, etc.
- Email to E-File allows documents to be added to E-File queue from email message
- Add or modify filing categories
- Real-time view of waiting, in queue documents
- Scan from location filtering
- Program assignment filtering (fset,wia,etc.)
- Assign documents by first, last, full ss or last 4 digits of ss#
- Utilizes Adobe PDF viewer for all document viewing
- Email to Storage. Email file to – [atlas@domainname.com](mailto:atlas@domainname.com) and document will be sent to the specified queue
- Fax to Storage. Incoming fax can be routed to specific queue
- Email to Storage subject line classification. Subject line filter assigns email document to correct program queue, such as WTP, FSET, etc. Email receipt notification is sent to originating email address
- Location and program queue count
- Back-end adjustable filing categories, modify scan categories at anytime
- “View only” queue allowing case managers to view documents waiting to be filed
- Filter “View only” queue by date range
- Document fetch system prohibits the same document from being viewed by more than 1 staff while filing
- “On The Fly” *image* conversion, convert 24 types of images to PDF when they are put into the queue
- “On The Fly” *document* conversion, convert popular document types automatically to PDF format – doc, docx, xls, rtf, txt
- Staff scan component seamlessly integrates with the Storage system, archiving documentation for the customer in an easy to use web based interface
- Barcode form recognition. Allows for commonly used forms to be archived without reviewer intervention
- System validation module. Allows for review and resolution of customers that have used the same social security number or other inaccurate filed information.



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## Self-Scan

- State-of-the-art hardware/software solution designed to alleviate customer dependence on staff
- Customers scan and file pre-determined documentation to assure compliance policies
- Self scan is Barcode and ESI (Electronic Signature Imprint) ready - forms with pre-defined barcodes are pre-set to appropriate filing category
- Scan can be filed automatically or sent to the queue for review
- Robust hardware eliminates equipment failures and allows for placement in unsupervised areas
- Enable customer to scan documentation utilizing self-service kiosks
- Easy to use front end interface allows customers to sign in and scan documentation for a preset list of services – Time Sheet, receipts, etc
- Service list is adjustable from the backend. Change available scan services for kiosk within minutes
- Self Scan kiosk can be used with any twain compliant scanner
- Acknowledge scanning of the documentation via the ESI module – Electronic Signature Imprint





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## Self-Sign Self-Service kiosk sign in system

- Self service front-end intake system designed to be placed in lobby or waiting room
- Allow customers to sign in and select pre-determined service(s)
- Available location based services are controlled from back end control panel
- Easy to use Touch-Screen kiosk platform
- Staff can monitor Self-Sign Queue and be notified only when a customer meeting the defined filter description signs in
- Staff can filter the Self-Sign Queue by location and service required
- Assign customers to secondary service after initial intake
- Integrated with Adobe Air to notify staff of waiting visitor
- Self-Sign component seamlessly integrates with the Storage system, archiving visit information for the customer in an easy to use web based interface
- Capture customer signature via signature pad during first visit creating an Electronic Signature Imprint (ESI)
- Integration into Self-Scan module from within Self-Sign
- Integration of FLORIDA drivers license for customer registration and login

## Alerts – Build alerts for specific activities within ATLAS

- Build alerts to notify staff of activity within the ATLAS application
- Send alerts to desktop client and email
- Customize ALERTS to notify on items such as customer login, document filing, registration status

## Orientation - (FSET, WIA, WTP, ARRA, One-Stop orientation) - On-line, self-orientation system

- Self guided orientation system. Users are guided through an easy to use web based presentation
- Optional testing of customer to assure comprehension of material
- Orientation progress and status is filed into Storage
- Snapshot of User Completion certificate is added to the customer record
- Orientation platform can be used for a variety of programs: FSET, WIA, WTP, ARRA, OneStop, New Employee, etc
- Create customer orientation report packages in pdf or excel format



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**Programs** – Create customized program registrations, enrollments and orientations

- Create custom electronic registrations for traditional paper based forms
- Allows staff to build forms at will for temporary or long term programs
- Registration data workflow allows for complete automation of applicant data as well as “approval” type programs.
- Create program registrations that integrate different types of media, including PowerPoint, Flash video, PDF and URL’s
- Allow for customer upload of documentation
- Integrates with self-scan kiosk module to allow for intake of paper based documents at self-service kiosks
- PDF snapshot of all electronic data to standard PDF template or can be over-laid on custom form

**E-Course** - Course development and testing module

- Build specific courses tailored to your exact requirements
- Track course progress and grades from within the Storage system
- Create robust courses with lessons that incorporate different types of lesson media (Video, Audio, PowerPoint, DOC, EXCEL, PDF, etc.)
- Assure participant compliance by administering lessons and tests
- Can be utilized at the staff or customer level. Additional training can be documented and stored to the staff training log via Storage
- Create and deploy custom tailored instructional content
- Create answer files with associated grade requirements to pass
- Automatic review and grading of completed lessons
- Automatically Issue customized completion certificates
- E-Course component seamlessly integrates with the Storage system, archiving documentation, course activity and grades for the customer in an easy to use web based interface



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## Electronic Signature Imprint (ESI)

- Process to allow customers to digitally sign documents through a web based delivery system
- Electronically signed forms are formatted and stored as “original” signed documents pursuant to the E-SIGN act of 2000 (Pub.L. 106-229)
- ESI can be integrated into all ATLAS modules as well as web content outside of ATLAS
- Customers apply a ESI and progress through Intensive service program forms via an ATLAS web based client controller
- Allows customers to electronically sign documentation, training, orientation or other forms that are traditionally paper based

## Events - Automate the process of scheduling and registering customers for events

- Create “register-able” events with seating capacity
- Define location, type of event, date and time
- Allows for complete self-service registration of event
- Built in 3 day and 24 hour event reminder
- Attendance Roster allows for facilitator to print hardcopy sign-in sheet or record attendance directly from module
- Create excel attendance reports based on event parameters



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## Sample Deployment Procedure

### 1. User Interface/Prototype Demonstration (Requirements) –

- a. CTS will work with WORKFORCE to define all software, hardware and support level requirements as related to:
  - i. ATLAS modules – Which ATLAS modules will be used? Develop requirements of each module as related to the specific location deployment
  - ii. Locations – How many locations will be accessing the ATLAS system? Which modules will be utilized at what location?
  - iii. Users – What modules will users have access to? What are their role definitions?
  - iv. Hardware (scanners and pc’s) – What existing hardware will be used? Where will new hardware (kiosks) be placed?
  - v. Security – Define preliminary administrator security roles
  - vi. Workflow and queue management - What queues will need to be setup for document workflow?
  - vii. Queue creation – Define what Queues will be needed.
  - viii. Filing category creation – What categories will be available on staff-scan stations, MF scanners.
  - ix. Self Scan workflow definitions – Routing of document from self service kiosks to appropriate filing queues.
  - x. Self Service assets (kiosks) – What self service selections will be available by location?
  - xi. Define requirement for additional ATLAS modules. E-Sign, Orientation, E-Courses.
  - xii. Training – Who is considered a WORKFORCE champion to receive initial training
  - xiii. Support Services – Define support request procedures
  - xiv. Maintenance – Define maintenance procedures
  - xv. IT infrastructure - speed, redundancy, backup, server and network equipment
  - xvi. Archival/retention - Create archive and retention plan for “inactive” documents

### 2. User Interface/Prototype Demonstration (Design/Customization)

CTS will work to define and alter/customize aspects of the ATLAS software to be specific to the implementation requirements defined

- a. Define logos, colors and general “look and feel” of *Staff* service modules
- b. Define logos, colors and general “look and feel” of *Self* service modules.



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### 3. Installation (Implementation)

- a. Deploy test versions of each module for verification. Modules are suggested to be tested in the following order.
  - i. Storage
  - ii. Self Sign
    1. P-Series kiosk with/without scan-bed or ADF
  - iii. Staff Scan
    1. Desktop scanning
    2. Canon MF devices or other Scan Devices
  - iv. Self Scan
    1. P-Series kiosk with scan-bed or Automatic Document Feeder (ADF)
  - v. Orientations
    1. Create orientation flow and ATLAS activity log integration
    2. Integrate Orientation content as provided
  - vi. E-Courses
    1. Course setup
    2. Module setup
  - vii. Electronic Signature Imprint (ESI)
    1. Define ESI master “paper” form
    2. Define web based “Program” forms that will be presented via ESI controller
    3. Define web based “Intake” forms that will be presented via ESI controller
- b. Implementation phase will be performed in conjunction with training. As new modules are implemented the TBWB training champion will be engaged.
- c. Post verification of implementation will result in deployment of production version. And verification process will be performed again on production version module to assure quality of use

### 4. Acceptance Test and Production Implementation (Verification)

- a. Verification by CTS staff as well as designated WORKFORCE staff will be conducted to assure functions are operating properly and are in line with initial requirements phase and includes the following
  - i. Security
  - ii. Look and feel
  - iii. User and staff settings
  - iv. Queue details and filing categories/document management
  - v. Additional module verification
  - vi. Hardware and self service usability



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## 5. Software Maintenance and Support (Maintenance)

- a. The ATLAS system is delivered as a Software as Service(SaaS) model. Ongoing maintenance, updates and product support is included within the SaaS contract.
- b. Support services are provided from the CTS office located in Spring Hill, FL approximately 1 hour from Hillsborough County.
- c. Maintenance of application is divided into 3 sections
  - i. User interface with associated modules
  - ii. Data repository and database
  - iii. Backup and archival processes
- d. The SaaS approach allows for ongoing support as needed. Within a fixed fee structure
- e. General Support is available Monday-Friday 8:00am – 6:00 pm
- f. Emergency support is available 24x7
  - i. Mission critical issues are escalated immediately. This included hardware failure or equivalent.
- g. Response times
  - i. During business hours( 1-2 hours)
    - 1. Response is considered a return correspondence indicating the issue has been acknowledged and is being addressed
  - ii. After hours (4-6) hours
    - 1. Response is considered a return correspondence indicating the issue has been acknowledged and is being addressed
- h. Escalation procedures
  - i. Support correspondence (telephone, email, fax, support ticket) is initiated
    - 1. 30-45 minutes – Support personnel receive the support ticket
    - 2. 45-60 minutes – Support request is reviewed and handed off to appropriate personnel
    - 3. End User is notified of support acceptance
    - 4. 60-75 minutes - Personnel reviews issue and formulates resolution issue
    - 5. 75 -120 minutes – Personnel resolves issue and updates user of resolution
  - i. CTS utilizes a Ticket based support system. This system is accessible from the ATLAS main interface. If the ATLAS main interface is inaccessible then other support communications processes will take effect. The ticket system provides for escalation and monitoring of the issue as required by the RFP.

## 6. Warranty

- a. Hardware
  - i. All Kiosk hardware provided by CTS comes with a standard 2 year warranty
- b. Software
  - i. SaaS approach assures software warranty. All issues are defined and isolated as per the software maintenance and support requirements.



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## 7. Training

- a. Training will begin at the Implementation phase and be ongoing
- b. WORKFORCE will designate a project “Champion”. This person will be considered the project owner and communication will be primarily directed to this person
- c. CTS will provide direct training of the WORKFORCE staff
- d. CTS will train staff as necessary to manage and utilize specific modules within the ATLAS system.
- e. ATLAS Web accessible help tutorials are available within the ATLAS interface for all registered staff. Tutorials consist of live “follow along” scenarios broadcasted via screen-cast.
- f. Training equipment may consist of projector or large LCD screen
- g. Prerequisites include watching the provided on-line training tutorials
- h. CTS intends to train Managers to administer and oversee ATLAS modules and user to use the system proficiently.
- i. At the release of changes updates or versions, CTS will inform, educate and train as appropriate. Initial communication of these changes will be with the WORKFORCE Champion and based in feedback be released at appropriate agreed times.
- j. Primary training will consist of CTS staff working with WORKFORCE staff in a “live” environment. Training will be provided on-site at specified locations set forth in the requirement section.
- k. For maximum training effectiveness CTS recommends small, intense groups that consist of like-kind users. Groups should be no more than 4-6. Proposed training groups will be as follows. Primary training areas will consist of:
  - i. Storage usage
    1. Setup and management of filing categories
    2. Searching, adding and updating customer files
  - ii. Self Sign
    1. Self Sign services creation and administration
    2. Monitoring and using Self Sign Queue’s
  - iii. Staff Scan
    1. Scanner setup and administration
    2. Queue directory setup and administration
    3. Filing directly setup and administration
  - iv. Self Scan
    1. Setup and administration of Self-Scan definitions, including queue routing
    2. Setup and administration of Self Service button selection
  - v. Orientations
    1. Orientation administration. Content, confirmation testing, and certificate administration



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- vi. E-Course
  - 1. Setup and administration of courses and modules
  - 2. Development of E-course material
  - 3. Customer assignment of course
- vii. Electronic Signature Imprint (ESI)
  - 1. Setup and administration of E-Signature based forms
  - 2. Form and form definition development training





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## 8. Documentation

1. ATLAS is a web-based system. Documentation is released and maintained through the ATL

## 9. Media Obsolescence

1. CTS will work with WORKFORCE to determine the archival and retention policy. Automation can be applied to purge or archive documents as required. The ATLAS database structure contains an “archival” data set that allows users to search archived data.

## 10. Change Management

1. CTS is committed to a successful project. The ATLAS implementation is fairly straightforward. Completion of similar projects allows us to draw from best practices. However, CTS understands the need for customized solutions and will work with the WORKFORCE to discover and implement those solutions.

## Project Implementation Timeline:

Assuming a contract award of no later than DATE. Dates will slide accordingly based on later contract award.

- 1) Requirements
- 2) Design/Customization
- 3) Implementation
- 4) Verification
- 5) Support and Maintenance
- 6) Hardware – Kiosks



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## Character References

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