City of Waukesha IT Technical Assessment

Requesting Department Use

Fiscal Year: 2018   Requester: Nancy Faulk   Title: Director   Dept: Cemetery

Project Title: Memorial Business Systems Cemetery Accounting Software

Project Overview and Goals: Current CIMS software is 19 years old, approximately $68,000-$70,000 were spent on current mapping system over the years and had no accounting functionality.

New MBS software has an accounting system called Nexus 4. Software was created by a Cemeterian/Accountant and suits the cemetery's needs. This product comes with great referrals from the current Cemeteries that are utilizing the software. Calculates payment options/interest and Trust amounts.

In addition, we will be replacing our current mapping system, CIMS with MBS- IMAP mapping program. The two programs work together and will automatically keep track of current and sold inventory.

Mapping changes can be done in-house by system administrator and will result in significant savings.

Project Costs:

Total of Year 1 costs (purchase, training, implementation): $16,467.00

Annual Maintenance & Support costs: $1700.00

Proposed Project / Technology

Check one: X Replacement ☐ New ☐ Upgrade ☐ Other:

Will any of the following need to be purchased: PCs, Handheld devices, Laptops, printers, scanners, etc.

☐ N/A ☐ Yes   X No

If yes, please explain:

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Vendor Use

General overview from vendor of the application topology and what the application does:
The following questions are designed to help determine the appropriate infrastructure costs in conjunction with system type/criticality information.

Company Name: Memorial Business Systems, Inc.
Project Title: Software for the Waukesha City Cemetery

Application Architecture

What is the Application Architecture (if known)? The options are as follows:

☒ Client / Server   ☐ Client   ☐ Web Based   ☐ Other:
*Web-Based is preferred

Where is the Application Architecture installed? The options are as follows:

☒ On-Premises   ☒ Hosted   ☐ Other:

If the Application Architecture is hosted, what model is used?

☐ Infrastructure as a Service   ☒ Software as a Service   ☐ Platform as a Service

☐ N/A   ☐ Other:

If the Application Architecture is hosted, and the City stops using the solution, is there a charge to get our data back

☐ Yes   ☒ No

If the Application Architecture is hosted, what certifications do they hold?

☐ SAS 70   ☒ SSAE 16   ☐ FedRAMP   ☐ Other: ISP provides servers that are SSAE 16 Type II Audited. MBS does not hold direct certification.

Web Application Requirements

☒ N/A: This is a Client/Server Solution

What Web Browsers are supported?
☐ Internet Explorer ☐ Chrome ☐ Firefox ☐ Browser Agnostic ☐ Other:
* Browser agnostic preferred

What Browser version is supported?
Internet Explorer: Chrome: Firefox:

What Web service is used: ☐ IIS - Version ☐ Other – Version
*IIS Preferred

What third party software needed?
☐ A Java add-on is on the client, version #
☐ Active X add-on on the client
☐ .NET Framework, version
☐ Digital certificates (IE based app. or ASP)
☐ Adobe
☐ Add-ins for existing applications (IE MS Office, etc.)
☐ Other
☐ Not Applicable (none needed)
*None Needed is preferred.

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Server Requirements

☐ N/A: This is a Hosted Solution

Specify the type of server the main component of the application will be installed on?

☒ MS Server What Version? 2008 or higher What Service Pack?
☐ LINUX - What version?
*MS Server is the standard

What database will be used?
☒ MS SQL   What version? 2008 or higher (software ships with SQL Express 2008 R2) What SP?
☐ Oracle   What version?
☐ Other   What version?
☐ N/A
*MS SQL is the standard

Is database fully vendor supported?

☐ N/A   ☐ No   ☐ Yes Notes: Not sure. We assist client with installing SQL Express that ships with software, unless client is using internal SQL Server. We have documentation for the latter and provide assistance if there are problems.

*Vendor supported is preferred

Does the vendor require the application and Database to reside on same hardware?

☒ No   ☐ Yes Notes:

If no, can the application and Database reside together for the test system?

☐ No   ☒ Yes Notes:

Are virtual servers supported?

☐ No   ☒ Yes Notes:

*Virtual Servers are the standard

If yes, which Hypervisors?

☒ Hyper-V Notes: ☒ VMware Notes:

Will any of the following servers be needed?

☐ Test   ☐ QA   ☐ Train   ☒ Not Applicable   ☐ Other   Notes:
Training is typically performed on live server at startup.

*Test environments are the standard *QA environments are preferred

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Client Requirements

☐ N/A: Web-Based solution

Is the application able to run in a Citrix/Remote Desktop/VDI environment?

☐ No   ☒ Yes   Notes:

Is Citrix/RDS/VDI fully vendor supported?

☒ No   ☐ Yes   Notes: Client is responsible for supporting internal infrastructure.

*Citrix is the standard.

What client operating system will be used?
☒ Windows 7 - What SP?
☒ Windows 10 - What SP?
☐ Other: What SP?
*The most current Windows OS is the standard.

What third party software needed?
☐ A Java add-on is on the client, version #
☐ Active X add-on on the client
☒ .NET Framework, version 3.5 and 4.0 are installed with software
☐ Digital certificates (IE based app. or ASP)
☒ Adobe Adobe Reader if PDF forms are used
☐ Add-ins for existing applications (IE MS Office, etc.)
☐ Other
☐ Not Applicable

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User Account Control

Does the application require users to login?

☐ No   ☒ Yes   Notes:

Does the application integrate with Active Directory for authentication?

☒ No   ☐ Yes   Notes:

*Active Directory is the standard for on-premises applications.

Does the application integrate with Active Directory for user account creation?

☒ No   ☐ Yes   Notes:

Does the application integrate with Active Directory Federation Services?

☒ No   ☐ Yes   Notes:

*ADFS is the standard for hosted solutions.

Additional Application Info

Can adequate system backup & recovery procedures be implemented? This includes the ability to test the restore processes on a "regular" basis.
☒ Yes   ☐ No

If the system requires transmission of information to a remote party, can it be adequately protected? (This would include encryption for data transmission, and at rest.)
☐ Yes   ☐ No Data transmission features are optional and not required

What will be the frequency of updates (i.e. dot (.) or SP)? No set schedule. Multiple times per year as needed.
What will be the frequency of upgrades (i.e. major releases)? Once every 1-2 years.

Is the application licensed per user? ☐ No   ☒ Yes   Notes:
If yes, are they concurrent licenses? ☐ No   ☒ Yes   Notes:

Is access to the Internet required for this application? ☐ Yes   ☒ No
If yes, please describe what access is needed and how it will be used: Some features utilize Internet, but these are not required for applicaiton to function.

Additional Information

Please use this section to add additional information, information that you feel the check boxes did not allow you to accurately explain, or any other technical information. You may also attach additional supporting documents.

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City IT Department Use

For standard systems:
In order to appropriately answer the "commensurate" or "adequate" nature of a particular response, the information in the Technical Assessment Pre-Screen should be considered.

Does the system meet City of Waukesha's technical standards?
☒ Yes ☐ No Please explain:

Is the expected combination of local and vendor support sufficient? This affects availability and integrity. It is important to recognize that vendor size & stability affect the answer to this question, in addition to their contracts, procedures, etc.
☒ Yes ☐ No Please explain:

If the Vendor requires remote access for system support, can it be adequately secured? This might involve one-time passwords, VPN connections, encrypted access, etc. If the vendor requires constant "root" level access, will not allow passwords to be changed regularly, requires "always-on" modem access, etc. the answer is "NO".
☒ Yes ☐ No

If the system requires transmission of information to a remote party, can it be adequately protected? (This would include encryption for data transmission, and at rest.)
☒ Yes ☐ No

Does the system provide adequate toolsets for User Identification, Authentication and Access Control? Generally, minimum requirements include a Unique User I.D. for each system user, a password associated with each User I.D., and password complexity allowing a minimum of eight mixed-case alpha and numeric characters (the ability to handle more characters and special characters is preferred). NOTE: If the application is MS Active Directory-aware, it meets our minimum criteria.
☒ Yes ☐ No